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DESCRIPTIVE LIST OF  
PROFESSIONAL AND NONPROFESSIONAL  
DUTIES IN LIBRARIES

Preliminary Draft

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Prepared by the  
Subcommittee on Analysis of Library Duties  
of the  
A.L.A. Board on Personnel Administration

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## INTRODUCTION

This list of duties performed in libraries should serve a variety of purposes. It can be used primarily to provide information needed in making job analyses. Even when no detailed job analysis is concerned, the basic division into professional and nonprofessional duties should be helpful in evaluating special work situations and improving the assignment of duties. The list should also be useful in preparing position descriptions and classification and pay plans. Civil service jurisdictions could use it to advantage in preparing examinations.

There are possible uses for the list with authorities and lay groups to whom it may be desirable to give an over-all view of what goes on in a library. For the same purpose it should be useful in vocational guidance and to students in library schools. Faculties in schools of librarianship may use it in preparing courses of study and in various instructional situations. It should have value also in organizing in-service training courses.

The major functions and activities ordinarily performed in libraries have been classified into thirteen divisions. The term "activity" has been used to designate these major divisions of library work. Under each activity are listed "duties" ordinarily performed in carrying out the activity, grouped under "professional" and "nonprofessional" with brief explanations intended to make clear the nature of the duty. As used here "duty" means a specific task performed to contribute to an objective, which in this case is to provide effective library facilities and services.

It is believed that the list of duties can be applied with some adaptations to libraries of all kinds and sizes. The activities under which duties have been classified are common to all libraries. Although the extent to which certain duties are performed and the methods used will differ in libraries serving varying clienteles, a large percentage of the duties listed should fit a large majority of institutions.

It must be borne in mind in using the list of duties that the classification is by general activities common to most libraries whether large or small, and that these divisions are not necessarily related to departmental organization in which there will be wide variations in practice. We are not concerned here with library organization nor with positions. However, it is possible to compile a work picture of any department or any position by selecting from the list of duties those performed in the department or performed by the person holding the position. Used in this manner the list of duties becomes the basis for a job analysis which should help to disclose overlapping functions, or uneconomical use of professional time, if these situations exist.

There are a number of duties such as Preparing reports, Supervising work program, Compiling statistics, Training employees or Preparing work and time schedules which may apply to several activities. Most duties of this kind will be found under ADMINISTRATION or PERSONNEL MANAGEMENT. The policy of listing a duty only once has been generally followed. Only in a few cases when the duty has special aspects in connection with a specific activity has it been repeated.

The Oxford English Dictionary defines a profession as "a vocation in

which a professed knowledge of some department of learning or science is used in its application to the affairs of others or in the practice of an art founded upon it."\* The Encyclopaedia of the Social Sciences in its article on Professions says: "It is this characteristic, the possession of an intellectual technique acquired by special training, which can be applied to some sphere of everyday life, that forms the distinguishing mark of a profession."\*\*

Applying these definitions to librarianship we may say that "professional" duties are those whose adequate performance involves the ability to exercise independent judgment based on an understanding of the elements of library service - books, readers, and the means by which they are brought into effective relationship - and in addition a familiarity with specific library techniques and procedures.\*\*\*

If a duty does not seem to meet this standard for its satisfactory performance, it has been classified as nonprofessional. It is recognized that librarians must frequently perform nonprofessional duties. However, this fact does not alter the character of the duty. On the other hand, if its classification is clearly recognized it may be a step toward establishing a better division of duties between professional and nonprofessional staff.

In the case of ADMINISTRATION, PERSONNEL MANAGEMENT and PUBLIC RELATIONS which are activities common to many institutions, "professional" has been used to designate duties which are on a professional level and which in a large majority of libraries will be performed by librarians.

In the list of duties page references have been cited after each duty to enable the reader to turn quickly to the accompanying explanation.

Mrs. Theodora R. Brewitt, Chairman  
Subcommittee on Analysis of Library Duties

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\* The Oxford English Dictionary (Oxford: Clarendon Pr. 1933), p.1427.

\*\* Encyclopaedia of the Social Sciences (N.Y.: Macmillan, c 1934), v. 12, p. 476. Used with permission.

\*\*\* It is readily admitted that many individual library duties classed as "professional" can be performed, after training in specific techniques, by "nonprofessional" library employees. Thus, a clerk can be taught to type an original, suitable catalog card for a straight author-and-title volume of English fiction; but duties involving the knowledge and judgment to apply and interpret cataloging rules to the entire range of books and other publications are clearly "professional," since they require not merely the knowledge of specific rules, but also a thorough understanding of the principles and objectives of cataloging, and its function in relation to the over-all purpose of libraries.

## LIST OF LIBRARY ACTIVITIES

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PERSONNEL MANAGEMENT

SELF-DEVELOPMENT OF STAFF

PUBLIC RELATIONS

SELECTION OF MATERIAL

ACQUISITION OF MATERIAL

CATALOGING AND CLASSIFICATION

MECHANICAL PREPARATION OF MATERIAL

REGISTRATION AND CIRCULATION

REFERENCE WORK

ASSISTANCE TO READERS

PHYSICAL UPKEEP OF MATERIAL

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## ADMINISTRATION

### Exclusive of Personnel Management

Administration has been defined as "getting the job done." Organizing and managing are its two main divisions. Before these functions can be exercised, however, general objectives must be determined and general policies formulated. This is the responsibility of the governing authority under which the library operates. Often in actual practice the distinction between policy making and administrative duties is not clearly drawn. Lay boards will sometimes tend to assume administrative functions and a strong administrator may take the leadership in determining policy for a board. Planning and policy making, however, are often the concern of both the governing authority and the administrator. While making final decisions on general policies is the function of the governing authority, such decisions usually result from suggestions and recommendations made by the administrative head of the library. On the other hand, the governing authorities may be actively concerned with executive planning which involves the library's over-all program.

Administrative duties may be performed on different levels. Some of them apply primarily to the work of the chief librarian in connection with the operation of the library as a whole. Some of them, such as policy making, planning and reporting, apply also to specific activities and will be performed by members of the staff who are in charge of these activities. Such administrative duties have been repeated under another activity only when it seemed necessary to indicate special aspects of the duty connected with a specific activity.

In the division of duties the terms "professional" and "nonprofessional" have been used to maintain uniformity with other activities. In this case "professional" may be interpreted as "administrative or a professional level" and "nonprofessional" as "clerical duties incident to administration."

### Professional Duties

#### Interpreting objectives

"Objectives" as used here refers to the basic aims of the service to be rendered by the library. Theoretically these are determined when a library is founded, but generally they are implied rather than expressed in specific terms. To determine objectives is not an administrative function but one belonging to the governing body. In many cases, however, the administrative head of the library will find it necessary to take the lead in clarifying objectives by formulating a clear statement of them. This will be used as a guide in making administrative decisions and in studying proposed activities or evaluating activities already in operation.

#### Over-all planning

The orderly development of library service will often require a planned program covering a period of years. Increased student enrollment or expansion of the curriculum into new fields are factors which determine need for new services or agencies in college libraries whereas population trends or changes in character of the community are factors to be considered in

public libraries. Consideration will be given to the establishment of new services, improvements in organization and enlarging or building new buildings. The order in which projects should be carried out must be decided, their costs estimated and the need for each improvement justified to authorities. While the emphasis in such planning is often placed on building programs, libraries which are not concerned with extension problems may plan long range programs for expansion of services and other improvements.

### Organizing

"Organizing ... relates to dividing activities in such a way that the advantages of specialization are achieved with as much recognition as possible being given to the essential unity of the program."\* As a duty this requires a broad knowledge of practices both within and outside the library field. In growing libraries organization is a continuing process. New departments may be set up. A job analysis may disclose that a better grouping of duties should be made. Changes in organization may be needed to improve service to readers or to effect better coordination of activities. In small libraries problems of organization will be concerned with the assignment of duties to individuals and in giving them a clear understanding of specific responsibilities and line of authority. In large libraries organization will be much more complex, involving many levels of responsibility and more extensive division of functions. Organizing within the limits of a specific activity will be a duty of the person in charge of the activity, subject to approval to assure adherence to the basic plan.

### Investigating administrative problems

There are many problems in the administration of a growing library which will require research. Methods and procedures in public and private organizations will often be investigated as well as those of other libraries. This will require reading, correspondence, conferences. Questionnaires will be prepared and replies tabulated and evaluated. Reports and statistics from other libraries will be studied and analyzed. This is an important duty of the chief administrator and frequently of department chiefs, staff committees, or individuals with administrative responsibility in any field of library activity.

### Planning and initiating new activities

Any library which is not static will frequently need to develop its services to meet the requirements of growth and changing interests. The duty involves awareness of trends in library service in general and a knowledge of the needs of the specific clientele to be served. Examples of possible new activities are the starting of a record library, or a special reading room for young adults. The new activity might be a vocational counseling service or possibly starting a documents library. When a new service has been decided upon, putting it into effect may require new or readjusted quarters, special furniture or other equipment and additional staff time. New statistical forms may be needed and special procedures must be determined. Frequently a plan of publicizing the new activity must be

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\* E. W. McDiarmid and John McDiarmid, The Administration of the American Public Library (Chicago: American Library Association, 1943), p. 1.

worked out. Although many more specific duties may be involved in planning and initiating new activities, this duty is nevertheless a definite administrative function.

### Supervising work program

The task of laying out and assigning work and seeing that workers are effectively employed is an administrative duty which is performed on various levels. In larger libraries it will be done by department heads and staff members in charge of any segment of work in which several people are employed. In small libraries it will be the duty of the chief librarian. In any library, whatever its size, it will be the duty of the chief librarian to see that the work program is effectively carried out.

### Determining records, statistics and forms required

To determine what statistical facts and records concerned with its own activities a library needs is an administrative duty. Without such information intelligent management is impossible. When the kinds of information needed are decided upon, forms must be devised which will show clearly the information desired. Beside the records and statistics regularly kept such as books cataloged, borrowers registered, books circulated, reference services rendered, reading room use, etc. there are special services, technical activities and routines which many libraries will want to measure. Statistics on books circulated per hour per person will make possible a comparison of work load in different agencies. The number of books lost in overdues may show the need for better overdue procedures. The number of students using language records, children attending story hours, or the number of books borrowed by interlibrary loan, will serve to explain the extent of library services. In addition to the forms needed for statistical records most libraries will use letter, postal and other forms to expedite and systematize work connected with various library activities.

### Coordinating activities

A library to be efficient, must, like any other organization, operate as an integrated whole. Policies must be uniform. Overlapping must be prevented. Understanding of the library's objectives must be promoted. The staff in each department should be informed about the other activities of the library. In a large library this duty may be assigned to a single individual. Often department heads in special fields will be responsible for the coordination of activities in their fields. Examples are the supervisor of children's work in a public library system and the supervisor of branches in a city or county library. In small libraries the duty will fall to the chief librarian. Coordinating devices used are staff manuals, meetings, conferences, bulletins, reports and committees. Both large and small libraries will also follow the informal procedure of conferring when special problems arise.

### Planning the budget

The responsibility for the preparation of the budget belongs to the chief executive. There will frequently need to be preliminary consultations with the library board or other governing authority on plans for expansion involving substantial amounts, since matters of policy are involved. Staff members will also participate by calling attention to specific needs for equipment or expanded service. Planning the budget involves careful and continual



analysis of possible sources of revenue, expected expenditures and the need and cost of increased services. Even in small institutional libraries where formal budgeting for the library is not practiced an annual statement of specific needs for the coming year will generally be desired.

### Justifying the budget

A clear and effective presentation of the library's budget is an important annual duty. Frequently the chief librarian of a public library will be responsible not only for justifying the budget to the library board but also to the city council which has the final voice in granting appropriations.

Budget requests may be accompanied by a general statement of library objectives, both immediate and ultimate, and supporting data which will justify the cost of the proposed objectives.

### Executing and controlling the budget

When funds have been appropriated, accounting procedures must be set up for the operation of the financial program, in order that expenditures may be properly controlled. It is the responsibility of the chief administrator of the library to approve all expenditures and see that they remain within the limits set by the budget, and occasionally to adjust the budget classifications to changing situations. When specific funds are allocated to a special activity the person in charge will perform this administrative duty in relation to the activity concerned.

### Directing accounting methods and procedures

This duty involves determining the character of the data needed to give accurate information regarding the financial condition and operations of the library and the manner in which such data may be effectively presented, analyzed and compared. Generally the governing body will determine the basic kind of financial information required but often the chief librarian will want more detailed data to guide him in determining policies and solving administrative problems. Libraries will vary greatly in the details and extent of accounting practice but in any library it is an essential part of general administration.

### Planning library buildings and equipment

Special problems are involved in designing library buildings and much preliminary planning based on the requirements of effective and efficient library service must be done by librarians before an architect can go to work. Not only the executive head of the library but those concerned with the operation of specific activities will take part in such planning. In the case of school libraries and special libraries only one or two rooms may be involved, but even here the librarian will be concerned with the location and size of openings, window heights, lighting and other details affecting the work.

Library equipment such as charging desks, shelving for special materials, reading tables, display cases, etc. will need planning in both large and small libraries.

### Directing maintenance of buildings and grounds

In any organization where buildings and grounds are involved there will be problems which must be dealt with on an administrative level. Often decisions must be made concerning extent and kind of repairs to be made. The need for alterations and improvements must be investigated and plans made and recommended to proper authorities. Hazards to safety in buildings or on property under the library's jurisdiction will often require administrative action. Lighting of grounds and location of shrubbery and walks must be considered from the standpoint of discipline and safety.

### Determining supplies and equipment to be purchased

It is a professional duty to be familiar with the special supplies and equipment connected with library functions and to know the sources where they may be obtained. Often this duty will require considerable investigation, before final decisions are made, since proper equipment has a direct bearing on the efficient management of a library.

### Selecting locations for field agencies

The locating of service outlets is an administrative duty which is especially important in city and county libraries covering large areas. The objective is to bring library facilities within easy reach of everyone who is entitled to use the library. In deciding where a service outlet should be located it will be necessary to study the area under consideration in relation to distance from other library agencies, the location of natural barriers, business centers, traffic arteries and other factors which may affect the use of the proposed agency. Community and neighborhood leaders and school authorities will often be consulted in an effort to understand the area. In growing communities where there are population shifts and new areas being developed, it will be necessary to watch for population changes and occasionally to relocate library agencies in conformity to them.

### Supervising field agencies

Close contact with and coordination of the work being done in field agencies is essential for unified library service. Field inspections will generally be made at regular intervals. These will permit direct observation of the use being made of the agency and the quality of the service given. Conferences with the person in charge of the agency will include such matters as the discussion of problems, the interpretation of rules and policies, suggestions for improvements and plans for new activities. Owing to distance between branch agencies and the central library, inspection visits must be supplemented by instruments of long range control such as manuals, bulletins and letters of instruction. Special forms and records will often be required to coordinate agency procedures and to furnish the kind of information needed about them.

### Moving and installing agencies

Moving and installing a library in a new location is an administrative duty which may be required in almost any kind of library. If the library is a large one, moving will involve extensive advance planning and preparation. In any case moving books involves special problems. Shelving capacity must be carefully figured in relation to books to be moved. The arrangement and

grouping of classes of books in the interest of efficient service must be planned and methods of moving books expeditiously and in class order must be worked out. Furniture layout plans will need to be made. Many details incident to closing one location and occupying a new one must be planned and their carrying out supervised.

### Relating the library to community interests

This is a fundamental administrative duty in public libraries since the effectiveness of the library will depend on the degree to which it serves the interests of readers and potential readers. However, the duty is not restricted to public libraries, since all libraries have their "communities" whose needs and interests must be studied. The duty will involve keeping up with local events and activities through local publications and often active participation in organizations having civic, educational or cultural interests. This duty is related to Making community contacts under PUBLIC RELATIONS but is primarily administrative since its objective is not to publicize the library but to discover specific things which the library can do to improve or extend its services.

### Participating in library board or committee meetings

Attending meetings of the governing authority is generally restricted to the administrative head of the library, though occasionally other members of the staff will be called in when matters of special interest to them are under discussion or specific information is needed. In the case of public libraries with lay boards or college libraries with faculty library committees, the chief librarian often acts as secretary to the board or committee. In any case it is customary for the chief librarian to attend regular meetings at which time he will present problems requiring consideration and plans for which approval is needed. Preparation for board or committee meetings involves assembling statistics and information and planning the effective presentation of projects and problems to be brought before the governing authority.

### Conferring with authorities

Especially where there is no governing board exclusively concerned with the operation of the library as in the case of municipal libraries under city managers or county libraries under county boards of supervisors there will be various authorities with whom the administrative head of the library must consult and to whom he will be responsible in various aspects of his work. These will include among others, purchasing agents, civil service commissions, and city or district attorneys. In any case since all kinds of libraries, including university, school and special libraries are integral parts of larger jurisdictions the chief librarian will need to confer frequently with officials. In addition to conferences within the library's own governmental organization there will be consultations with officials in other fields such as those representing social welfare, youth, school and business groups.

### Conferring with library users

The administrative head of almost any library will be visited by individuals and groups who come with suggestions for improvement of the library, requests for special consideration or criticisms of methods, rules and service. Sometimes there will be difficult problems of discipline or complaint which must be referred to the chief librarian when they have not been solved at the point of origin. Receiving such visitors and disposing of their

problems in a manner satisfactory to them and to the library is an important administrative duty.

On occasion the chief librarian will invite individuals or groups to meet with him to discuss specific questions concerned with library policies, practices and services.

#### Giving professional information

This duty will take a substantial amount of time in many libraries. It includes conferring with visiting librarians who have come to investigate library problems of various kinds, and answering letters of inquiry on such subjects as library policies, procedures, special services, buildings, and other administrative questions. Often inquiry will come in the form of questionnaires from governmental agencies, professional organizations, libraries, or individual librarians. Assembling facts and figures needed for these is a clerical duty, but frequently statements of opinion or explanation which must be prepared on a professional level will be required. In any case, it is a professional duty to review and approve information about the library sent out in answer to questionnaires.

#### Preparing reports

The extent and kind of reporting done will vary according to the size and type of library or the special activity concerned. Reporting as a duty will be performed on different levels. The administrative head of a library will report to the governing authority at least at the end of the fiscal year and often monthly. Such reports will include a summary of work accomplished, a financial statement and statistics concerned with the operation of the library and its services. Annual statistical reports are generally prepared for state and national library authorities. Still another type of report may be addressed to the library's users. Reports on special services or activities will also be made when the occasion requires.

### Nonprofessional Duties

#### Bookkeeping

The extent and kind of accounts kept will vary greatly according to the type and size of library and its financial organization. In some cases, all official accounting will be done in the central office of the institution, or jurisdiction of which the library is a part. Public libraries under relatively independent administration will do their own bookkeeping. Often a library will keep unofficial financial records for their own consultation even though official accounting is done elsewhere. In this case, the library will check with official records at intervals.

#### Compiling budget data

Much of the preliminary work in preparing a budget consists in assembling facts, figures and statistics. These may relate to expenditures for the past year in various budget classifications. Sometimes comparative figures covering several years will be needed. Often facts and statistics will be required to support requests for specific improvements or to justify requests for additions to the staff, salary increases, or a larger book fund. Most of this preliminary work, as well as much of the detail of actual budget preparation, is clerical in character.

### Compiling statistics

This is an administrative duty which will be performed in connection with most library activities. Such statistics will be concerned with quantity of work performed, services rendered, books added, borrowers registered, etc. The collecting, checking and tabulating of statistics will be required in investigating special administrative problems, in preparing reports and in answering questionnaires.

### Preparing graphs and charts

Libraries will have occasional need for the presentation of statistical information in the form of graphs and charts which will be used in annual and special reports, or in connection with surveys or investigation of specific library problems. Clerical workers with some knowledge of graphic methods will be able to do such work under general direction.

### Purchasing supplies and equipment

The clerical processes connected with purchasing supplies and equipment include securing preliminary information about sources, cost and quality, interviewing salesmen, and often shopping for and purchasing minor items bought from a petty cash fund. Purchase orders will be written and when items are received, they will be checked against orders and bills. In cases where central purchasing is practiced the library will be relieved of some of these duties. Even with central purchasing, however, requisitions must be written and often there will be special items concerning which the library will need to furnish information and specifications.

### Controlling supplies

This duty consists of keeping supply records, issuing supplies on request and seeing that they are reordered when necessary. A record of supplies which is commonly kept will include such data as source of purchase, price, date of order and quantity ordered.

### Taking supplies and equipment inventory

The clerical duty of taking inventory of supplies and equipment and keeping the necessary inventory records is an administrative function which corresponds to the same work in any organization. The duties connected with taking inventory of the book collection will be found under CARE OF SHELVES AND FILES.

### Keeping office files

This is a clerical duty similar to that performed in any business office. Files will include correspondence, purchase orders, bills and other material used in connection with the business administration of the library. The maintenance of a filing system involves organizing files, classifying and labeling material; filing and removing material from files; and seeing that labels, guides and folders are kept in good condition. This duty will also include responsibility for the proper recording of material taken from the files.

### Handling shipments for field agencies

Books, supplies and other material to be sent out to agencies must be collected, sorted and packed and incoming shipments must be unpacked and sent to their proper destinations. In connection with this work it will also be necessary to keep records which will give such information as the number of books sent each agency, supplies furnished, and often an author file of books in fluid collections showing where they have been used.

When a number of branches and stations are concerned a transportation schedule must be set up and other work connected with getting materials to and from agencies will be involved. Emergencies and other situations involving the rerouting or dispatching of special shipments will often need to be referred to the librarian in charge of supervising field agencies or, in smaller libraries, the librarian who initiated the shipment and understands the problem of library service involved.

#### Handling mail

This duty includes sorting, segregating, opening and distributing incoming mail, stuffing, stamping and sealing envelopes for outgoing mail and wrapping, weighing and stamping packages.

#### Routine correspondence

To write simple and routine letters which do not require dictation is a non-professional duty which is classified under ADMINISTRATION since the majority of letters will be in connection with administrative activities. Sometimes such letters will be written from brief notes. Writing interoffice communications by means of letters and memoranda is included in this duty. Routine letters will often follow a form established by the administrative head of the library. Experienced office assistants will often be able to handle a substantial portion of administrative correspondence without dictation.

#### Taking and transcribing dictation

In most libraries this duty will be largely connected with administrative correspondence and for that reason has been classified under ADMINISTRATION.

#### Receiving callers

Performance of this duty includes the reception of people who come to see the librarian on business connected with the administration of the library. It may also involve the handling of routine interviews with salesmen, workmen and others whose business does not require the personal attention of the administrative head of the library.

#### Microfilming

This method of reproducing newspaper files and other bulky or rare items may be undertaken in the library or contracted for with outside firms. If microfilming is done in the library, the work will require employment of an operator skilled in the use of necessary equipment. In any case, considerable responsibility is involved in inspecting and editing film.

#### Photocopying

This photographic process is employed to duplicate inexpensively, printed pages, maps and charts lost from books. It is also used to make available reference material, saving the originals from damage and loss. Library reports and records are often reproduced by this process.

#### Operating a switchboard

Technical knowledge and skill are necessary to operate switchboards effectively. Knowledge of the library and its services and tactful handling of calls will aid in referring questions to the proper stations.

#### Messenger service

Errands inside and outside the library building are included here. Books and supplies are delivered from one department, room, or agency to another. Items from shelves and files are procured as directed.

## PERSONNEL MANAGEMENT

In a discussion of the problems of library administration, one authority in the field has referred to personnel as "the key to administration." While it is only one of the phases of over-all administration, its importance to successful library service is of such degree as to justify a separate grouping of the duties performed in connection with it. In large libraries this function is often delegated to the assistant librarian or to an administrative assistant in charge of personnel, whereas in smaller libraries the function is generally retained by the chief librarian. Special librarians often have the duties in this connection performed for them by the administrative officers of the jurisdiction they serve. Where policy is set up by a civil service agency or some other central personnel office, the main job of the librarian is guidance and interpretation.

The duties outlined in the following section are essentially similar in all libraries, although procedures for securing and maintaining a staff vary in certain details in every library depending upon size and type of organization. For example, problems encountered in securing an assistant for a station of a county library's extension system would be different than those an administrator would meet in securing a subject specialist for a technical research library, although in each case the duty is one of recruitment. Public libraries under civil service generally maintain close working arrangements with the central personnel office, while those without this agency carry on directly with the library board, or other governing authority. A central personnel office is also a feature of many large educational institutions and school systems. In separately administered schools, the librarian confers with the superintendent or principal; in college or university libraries there is close relation with the president; while in a special library differences of organization provide for various methods of handling personnel matters.

In the division of duties the terms "professional" and "nonprofessional" have been used to maintain uniformity with activities described in other sections of the list. "Professional" here applies to duties on a professional level, but not necessarily in librarianship; "nonprofessional" applies to clerical duties incident to personnel management.

### Professional Duties

#### Setting up personnel policy and organizing a program

In the formulation of personnel policy the rights, privileges and obligations of both management and employees must be considered. This duty involves decisions determining the character of the library staff in relation to the kind and quality of library service performed. A statement of policy concerning the library's staff will answer such questions as: who is eligible for employment; what is an adequate staff with respect to size; what shall be the proportionate relation between professional and nonprofessional positions; what kind of staff is needed for branches or departmental libraries; how long shall the working week be; how much time shall be allowed for sick leave; how much for the vacation period? In school, college and special libraries there is the additional question of professional status in relation to other professional groups represented in the organization.

Libraries under civil service have a large portion of this job done for

them. In the majority of cases, however, it falls to those persons in the library who formulate administrative policy and is generally influenced by the over-all policy of the governing authority which may be the library board, board of supervisors, city manager, etc.; or in the case of schools and colleges or special libraries, the board of directors, board of education, general manager. Even with a central personnel office, there is considerable interpretation and detailing of policy which falls to the library administrator.

In addition to the long range personnel program, there are certain functions such as drawing the salary budget or scheduling vacations, for which an annual program must be set up.

### Making job analyses

In analyzing a job it is necessary to discover through questionnaires, observations, and interviews (1) what duties comprise a job; (2) the proportion of time spent on each duty; and (3) what knowledge, skills, and abilities are needed to perform them. Following this, a "job description" which outlines the distinguishing factors in the job is prepared.

### Classifying positions

This is distinctly an administrative function and consists of (1) analyzing and recording the duties and distinctive factors in each position in the library without regard to the person holding it; (2) grouping together those positions which are similar in nature into classes; (3) drawing up a description of each class; (4) allocating all positions to their proper class on the basis of similarity of duties.

A position classification provides a basis for sound employment procedure and is helpful in setting up examinations, rating the work of employees, arranging transfers and promotions, setting up a pay schedule, etc.

Classification is a continuing process, since new positions are added and duties of established ones altered as changes occur in the work program.

Libraries under civil service carry out these duties in close cooperation with the central personnel office, as do those in large public and private institutions. In the small library, this responsibility will fall largely on the chief librarian.

### Preparing and administering a pay plan

The development of a sound and equitable pay plan generally follows a job analysis and the adoption of a classification plan. In determining the basic scale of pay for each class and grade of position, the library administrator studies and considers such contributing factors as prevailing wage rates, living costs, the ability of the library to pay, wages paid for comparable positions in other libraries, the library's policy and procedures concerning promotions, and the principle of "equal pay for equal work." Where provision is made for minimum and maximum salaries, the range of steps between them and the relation of each to the other also requires careful study. Changing economic conditions necessitate review and revision of the pay schedules at regular intervals. Since more than half of a library's budget is frequently spent for salaries, the preparation and administration of a pay plan requires skill in both personnel and financial management.



### Justifying positions and salary schedules to authorities

When budgets are presented and at such other times as conditions require, the librarian will need to muster and present supporting evidence to the proper authorities in order to justify the number and kinds of positions and the salaries to be paid.

### Recruiting candidates for positions

Recruitment requires that the librarian maintain close contact with suitable sources such as colleges, and professional schools which train candidates for professional positions and with business colleges, special and trade schools which can provide candidates for clerical and other nonprofessional positions. In announcing civil service examinations the library works closely with the central personnel office by supplying names of agencies and individuals to whom such announcements might be sent. Direct community contacts which publicize work opportunities in the library by word of mouth, printed announcements, etc., are frequently employed in smaller public libraries, in county libraries with large extension systems, and in some special and college libraries.

### Conferring with placement agencies

This function is a phase of the recruitment program, and in libraries without a central personnel office it may require considerable time. In securing professional staff members the librarian turns to the library schools and to other libraries and professional organizations. Commercial and school placement agencies are a frequent source of supply for nonprofessional positions. College and university libraries often use the employment offices located on their own campuses for clerical and student help.

### Corresponding with applicants

This activity may include sending notices of examinations to interested applicants; answering inquiries concerning vacancies; offering positions to suitable candidates who have applications on file; arranging for physical examinations and personal interviews; corresponding with persons offered as character and professional references; confirming appointments; notifying unsuccessful applicants.

### Interviewing applicants

The interview affords an opportunity for the library administrator to evaluate an applicant's personal fitness, appearance, and attitudes, as well as to measure more carefully his training and experience. Most libraries make a permanent record of the data thus secured since many depend upon the interview as the primary evaluation for employment; others use it in conjunction with a written test. Frequently a composite evaluation is obtained by having several staff members interview a candidate.

### Preparing and scoring examinations

Preparation of both written and oral tests requires a broad knowledge of work performed in various types of libraries. Preliminary to drawing up an examination for a position, the library administrator decides what qualifications are desired for the job and what kinds of tests will best reveal the presence or lack of them. Performance tests are often used in selection

for nonprofessional positions. In addition to their use for initial appointments, examinations are often prepared to select candidates for promotions. Most libraries with a central personnel office do not carry any direct responsibility for preparing and administering examination, but offer guidance to the proper officials on subject matter, validity and reliability of questions, and on experience, training and other factors.

Scoring examinations is a professional task except in the case of those devised to require only a short answer. In that case the "key" may be prepared by a professional staff member, but the checking of answers against the "key" is a nonprofessional duty.

#### Discussing applicants and appointments with authorities

Armed with all available information, references, interview records, etc., concerning applicants who have successfully passed the required processing and examining, the library administrator weighs and discusses with the governing authority (such as the school board, the college president, board of trustees, library commission) the qualifications of these applicants and makes recommendations for appointments.

#### Selecting and appointing employees

Final selection and appointment of the staff is usually based upon the recommendations of the chief librarian to the appointing authority. (See Discussing applicants and appointments with authorities.) In some libraries selection and appointment are delegated to the librarian alone. In libraries under civil service, the appointing authority's selection is subject to limitations of local policy.

#### Cooperation with civil service authorities

In libraries under civil service one duty is to see that the policies and personnel problems of the library are made clear to civil service authorities and that there is mutual understanding and cooperation. This will require occasional conferences with civil service authorities and more or less frequent contacts by telephone or letter on minor matters.

#### Training and instructing new employees

Induction training which covers such items as employee rules and regulations, physical locations within the library, organizational relationships is a continuous training program. It ranges from the indoctrination and guidance given a new department head or supervisor by the chief librarian to the directions on how to open and distribute incoming mail given a new student assistant or page by his supervisor. Staff manuals and procedure books are frequently used for individual instruction and are often coupled with lectures for group instruction.

Training and directing student assistants is an important duty in libraries of educational institutions. The librarian's duty is to plan and supervise this work either for individuals or groups. In school libraries the librarian has the additional duty of providing a work experience for the students. Other volunteer workers who must be instructed and supervised are library school students assigned for field work.

### Training apprentices

Apprentice training is planned and conducted largely to prepare nonprofessional staff members for various grades of clerical positions. For example, apprentice courses are used in training personnel for field agencies where professional staff can not be provided. Many libraries also offer more advanced training of this type to college graduates to prepare them for the higher grade nonprofessional duties.

### Training employees to improve performance

In planning and conducting efficiency training programs the objective is two-fold: to increase the speed of the employees and thereby increase the amount of work done, and also, to improve the quality of work done. For the nonprofessional staff instruction in correct work habits and methods secures speed of operations. For the professional staff the formalized instruction given by department heads or qualified outsiders covering content in special subject fields improves the quality of work done.

### Training employees for advancement

Promotional training programs are planned to give opportunity for qualified staff members to prepare for promotions in rank. They include refresher courses, understudy methods, special technical courses.

### Planning and reviewing for personnel adjustment

This duty involves planning for expansion or reduction of staff, for transfers or reassignment from one type of work or from one division to another in the interest of more effective service.

### Making rules and regulations governing employees

These rules, frequently incorporated in a staff manual, are drawn to implement and interpret established personnel policy. They cover such matters as: staff conduct, privileges available such as lunch rooms, parking permits, retirement and other insurance, professional and employee associations, handling of absences, grievances, pay days, telephone calls. The staff often participates in the formulation of these regulations.

### Directing maintenance of personnel records

The decision as to form and method of maintaining these records is a professional duty. The actual work of maintenance is clerical, although in many smaller libraries, where the quantity of work does not justify division, both supervision and maintenance are combined under the chief librarian. For libraries under a central personnel office, duplication of records kept in the central office is often desirable.

### Supervising work and time schedules

A work schedule assigns specific duties and responsibilities, within the limits of the particular positions, to each staff member. In supervising their preparation the administrator considers aptitudes, special training, staff welfare, as well as the library's work program.

Time schedules indicate the working hours assigned each staff member for

a given period -- usually a week. When the library's hours exceed the established work week, owing to evening and holiday service, schedule making becomes proportionately complicated.

#### Approving vacation schedules

In order to insure sufficient staff at all times during the annual vacation period, the library administrator studies individual member's requests for time and passes upon them in accord with the library regulations covering such matters. The time devoted to planning vacation schedules will vary with the vacation allowance and the size of the library's staff; their preparation in large libraries entails extensive planning.

#### Approving requests for leave

Decisions on leaves will be made in accord with the library's general policy on leaves. Requests for extended absence for such purposes as travel, continuing professional study, maternity, or for sabbatical leave granted in college and university libraries, require special approval since they often entail the provision of substitute staff.

#### Separating employees

Interviews with staff members leaving the library through resignation, retirement, discharge or for whatever reason, offer opportunity for the librarian to clear up misunderstandings. In addition, these exit interviews often reveal useful information for improving the library's services and operations.

#### Making efficiency reports

Reporting on work performance or efficiency of the staff is done formally on specially prepared rating scales or charts by supervisors, or it may be done informally in short descriptive statements. In large library systems reports are generally required at regular intervals. They are useful in increasing efficiency and as a basis for salary increases, promotions, transfers.

#### Reviewing records of individual staff members

This duty includes examination and study of such records as employment and salary history; pre-library experience; training and formal education; special skills and interests; assignments in the library; efficiency reports of each employee. Such study provides information on which to base training programs, promotions, transfers, special assignments.

#### Conferences with individual staff members

This is a guidance and counseling task and covers both professional and personal matters affecting the work performance of the individual staff member and his relation to the organization.

#### Conducting staff meetings

Staff meetings arranged and conducted by the chief librarian, often with the aid of the staff, provide opportunity for joint consideration and discussion of common problems. They serve to inform the staff of new policies

and plans and to promote staff morale through coordination of the library's program. Except in small libraries, staff meetings are held at regular intervals. In large libraries the chief librarian usually conducts meetings of division heads at regular intervals also. (See SELF-DEVELOPMENT OF STAFF. Attending staff meetings.)

### Promoting staff welfare

Welfare covers both physical, financial and psychological well-being of the library staff. It may be effected in numerous ways, through the provision of loan funds, group health and retirement insurance, well considered physical working conditions. Often the library staff is active in promoting these services.

## Nonprofessional Duties

### Administering and scoring examinations

The amount of planning and organizing necessary in the administration of examinations will depend on the number of candidates. When the questions are of the type requiring short answers, scoring examinations is a clerical task, done in accord with a "key" prepared by a professional staff member. Libraries under central personnel offices are relieved of administering and scoring examinations.

### Preparing work and time schedules

In small libraries these schedules are frequently assigned informally, often only by verbal arrangement between a staff member and his supervisor. In larger libraries the paper work in preparing such schedules is considerable. In either case, they are generally drawn up for stated intervals such as a week, a month or more, and in school and college libraries may run for the school semester.

### Preparing and keeping personnel records

Such records are generally maintained for each employee and show educational background, experience, date of first employment and title of position to which appointed, records of time worked, sick leave, vacations and information needed in preparing the payroll.

### Making routine personnel reports and records

Answering questionnaires, completing reference forms and other routine records, in short, carrying out any paper work in accord with established policy is a clerical task.

### Preparing vacation schedules

This duty consists of drawing detailed schedules showing vacation periods for each staff member and the necessary adjustments to cover. It requires considerable time for preparation where the library's staff is large.

### Preparing payrolls

The payroll is prepared from the personnel records and consists of checking against names of employees for information on time worked, sick or vacation time taken within the period, salary rate, payroll deductions.

Keeping payroll records

This record shows the amount paid each employee at each payroll period, the cumulation within the fiscal year, the amount deducted from each for insurance, taxes, etc.

## SELF-DEVELOPMENT OF STAFF

The improvement of the qualifications of staff members on both the professional and nonprofessional levels is the joint responsibility of the library and the individual. For the library's activities in this connection see PERSONNEL MANAGEMENT. This section is concerned with the activities of individuals within the limits of library time.

The educational function of nearly all types of libraries, and the research activities served by others, combined with the interest of libraries in almost every field of learning place upon the professional staff a continuing obligation for development. Moreover, the fact that librarianship is a young and rapidly changing profession accents the need for constant study and thought on the part of administrators and staff members alike in order to gain a better understanding of the objectives of library service and of the means of achieving them. Librarians, therefore, need to read professional, subject field and technical literature, attend professional meetings, take advanced training, and participate in numerous other activities which will keep them abreast of current advances in librarianship and allied fields and develop leadership in the profession.

As members of a profession librarians have an obligation to advance that profession by participation in activities such as committee work, investigating library problems and writing reports and papers.

The time required for activities conducive to professional development is considerable. All libraries allot some library time for them since they directly contribute to the effectiveness of the service. Librarians will find it necessary, however, to spend a good deal of outside time on them.

Activities which contribute to the development of nonprofessional staff members will require a smaller amount of library time than those of professional members. Most libraries, however, will provide time for orientation courses and other in-service training programs, visits to other institutions and other activities which enable the nonprofessional staff members to improve performance of their duties. Since many of the duties connected with the self-development of staff members apply both to the professional and the nonprofessional levels, they have not been separated in the list.

### Duties

#### Reading professional or vocational literature

This includes not only the literature of librarianship, but that of various other fields of knowledge related to the library's service. Although some library time may be assigned for this, additional outside time will be required.

Nonprofessional staff members can improve job performance by reading manuals and articles relating to their work. Examples are secretarial manuals, books and articles on poster-making, mending and binding, and public relations.

#### Examining new publications

Librarians who directly assist readers need to examine new materials and to read or scan new books and periodicals. There is a growing recognition of the

need for allowing a substantial amount of library time for this duty.

### Attending staff meetings

While the staff meeting is a coordinating device for administrators it offers an opportunity to promote individual growth. Staff meetings and staff association meetings in the form of lectures, seminars, or panel discussions devoted to a critical consideration of librarianship, of education and social problems, and of books effectively promote professional interest and development.

Staff meetings afford the nonprofessional staff member the opportunity for gaining a better understanding of library objectives and services, and an acquaintance with fellow staff members.

See also Conducting staff meetings classed under PERSONNEL MANAGEMENT.

### Attending classes and lectures

Continued formal study is one of the best methods of increasing professional fitness. It enables staff members to acquire training in new fields and to deepen their knowledge of others. For some, advanced study in librarianship will be valuable. For others, the increasing trend towards subject division of the book collection, and the need, particularly in university and research libraries, for subject specialists who can render expert assistance to readers and help in developing various subject collections, make graduate study in subject fields desirable. Few libraries grant leave with pay for such study, but many libraries allow some library time.

Since nonprofessional assistants frequently come to the library with little or no knowledge of libraries and library procedure, they can gain a great deal from orientation lectures and training courses. Examples are lectures outlining the organization of the library, and instruction in methods of handling telephone calls, how to meet the public, as well as in the more specific duties such as filing and mending.

### Attending professional meetings

Attending conferences of national, state, and local professional organizations as well as meetings of other societies in related fields affords the opportunity for the mutual discussion of professional problems, for learning new developments in the field, and for contacts with the leaders of the profession.

### Participating in activities of professional organizations

It is customary in many libraries to allow a generous amount of library time for committee work, participation in programs and other professional projects which contribute to the growth of the individual as well as to the profession generally. Such activities are not necessarily confined to library organizations but may also include educational, learned and technical societies in fields related to the work of the individual.

### Visiting libraries

Visits to other libraries provide librarians the opportunity to investigate problems connected with their particular work, to study methods and



techniques and to discuss common professional interests. Nonprofessional staff members are also benefited by observing methods of performing similar duties in other libraries. Such visits serve to stimulate interest and increase understanding.

## PUBLIC RELATIONS

The effectiveness of a library depends to a large degree on the extent to which its policies and objectives are understood and its varied services known. Hence any well administered library will have a public relations program designed to show how the library functions in the interests of its clientele and to promote greater use of its services. This will involve a variety of activities which will vary considerably in different kinds of libraries. For example, public libraries designed to serve an entire political division - city, township, or county - where use of the library is voluntary, will naturally have a more extensive public relations program than special libraries or school and university libraries. There are, however, many activities common to all. The variations will be largely in scope and emphasis.

Very large libraries will often have a public relations specialist who is not a librarian but who has a broad understanding of the library's functions. Although the practice of public relations is a vocation in itself, this work will be the responsibility of a librarian in a majority of libraries.

In listing public relations duties a few have been omitted which at first thought might appear to belong here but which are intended primarily to help readers in the choice of books rather than to publicize the library. Examples are preparation of reading lists, book displays arranged inside the library and book talks. These have been classified under ASSISTANCE TO READERS.

### Professional Duties

#### Planning a publicity program

Time spent in developing an over-all plan for public relations activities will insure a balanced annual program. This will change from year to year and will be affected by new library services, current trends, the growth of the community or the institution and changing community or institutional interests and developments. In view of these factors, decisions must be made concerning agencies and groups to contact and phases of the library's services to be emphasized. Planning will also help to maintain a regular flow of publicity designed to keep the library and its services constantly before the community. Although planning is an administrative function it is included here to indicate the aspects of planning connected with public relations.

#### Planning and writing news stories and articles

Public libraries especially must be kept before the public by means of a steady flow of news stories and occasional feature articles in the local newspapers. Beside writing the articles, this duty involves compiling data and interviewing department heads, branch librarians and others to obtain material. While local newspapers will furnish the chief media for most stories, school and college papers, house organs, periodicals, bulletins of organizations and other publication will also be used.

#### Interviewing press representatives

Newspapers send reporters to public libraries regularly or occasionally in search of stories. In the case of school or college libraries these reporters

will come from the school paper. Interviews involve answering questions, looking up facts and figures, showing the reporter around the library, planning pictures, etc.

### Scanning local publications

Regular checking of local papers and other local publications will furnish much information needed in writing news stories and in making contacts with individuals and groups. Group interests, names of new officials, community problems or events with which books may be connected and many other facts and ideas will be obtained in this manner.

### Composing, designing and editing miscellaneous printed publicity

Printed publicity in addition to news stories includes placards, posters, handbills, information folders, annual reports and similar material. To see that these are effective in wording and attractive in form requires time and study.

### Arranging for the distribution of printed publicity

This involves interviews with officials of agencies or organizations, to obtain permission to display posters, distribute booklists, folders or handbills. It may include attendance at meetings where material is to be distributed. Sometimes it will mean soliciting and directing volunteer help in distribution of materials: as for example, engaging Boy Scouts to deliver invitations to use a neighborhood library.

### Writing for and editing library bulletins and news letters

Library bulletins and news letters vary in content and purpose. When they are only lists of new books, work on them is bibliographical and classifies better under ASSISTANCE TO READERS. The duty here applies to publications intended to publicize the services of the library and promote understanding of its objectives.

### Making community contacts

Much of a library's public relations program can best be carried on through organizations which in turn reach many people and represent many kinds of interests. For this reason librarians will make as many contacts as possible with groups to which the library can be helpful. This often means taking an active part in community activities, such as serving on boards and committees. This is especially true in public libraries where the community is an entire political jurisdiction. Most schools, colleges and business institutions also have organizations and groups with which their libraries will need to cooperate. Conditions must decide to what extent outside activities should be undertaken on library time. There are many contacts outside of the library, however, which have direct relation to the promotion of library services. These include visiting newspaper editors, parent teacher associations, city officials, chambers of commerce, government offices, social welfare agencies, and various school and college organizations to which the library can offer special services or with which it can cooperate. There are also occasional public or institutional meetings at which the library should be represented. For closely related duties see Relating the library to community interests under ADMINISTRATION.

### Giving talks

This public relations function will be performed by various members of the professional staff. Talks which can be classified under PUBLIC RELATIONS will be about special services, resources in special fields, how the library functions, library development plans, etc. Book talks have been listed under ASSISTANCE TO READERS.

### Planning displays and exhibits

In preparing displays, it is a professional function to select the subjects and books to be exhibited, and to plan the wording to be used on accompanying posters or placards. The arrangement of displays from the standpoint of artistic effect should be done by a staff member best fitted for this who may be nonprofessional. Included under this heading are such activities as window displays, preparing floats for parades, displays and booths for local fairs, exhibitions, conferences, conventions, etc. Frequently it will be necessary for a librarian to be in attendance to answer questions, promote interest, and distribute literature. Displays within the library which are intended to help readers in selecting books have been classified under ASSISTANCE TO READERS.

### Sponsoring "Friends of the Library" groups

As a means of developing good public relations some libraries have organized or actively assisted in the establishment of "Friends of the Library" groups. In colleges and universities such groups will generally be made up of interested alumni who will assist in acquiring valuable gifts for the library or aid in its development in other ways. Public libraries will enlist the interest of civic leaders, educators, officials and others. Where these organizations exist, librarians must keep them informed about the needs and activities of the library, plan programs, arrange for meetings, suggest ways in which the group can be helpful to the library, and do other things which will help to maintain interest.

### Arranging for and conducting visits to the library

Visitors will include city officials, clubs with special subject interests, adult education classes, "Friends of the Library" groups and others. Not only groups but individuals with special interests in the library's arrangement, organization, or resources will frequently need to be conducted about the library.

### Writing promotional letters and cards

Often the most effective means of introducing special services or resources to people who could profit by them is to write to members of organizations or to key individuals telling about them and inviting their use. The sending of "special interest" cards calling the attention of individuals to specific books is a reading guidance service and as such has been classified under ASSISTANCE TO READERS.

### Establishing and revising mailing lists

When library publicity is to be distributed by mail it is a professional public relations function to decide on the scope of distribution and to prepare

a list of suitable people by checking club rosters, directories and other sources. The work of assembling and typing can then be turned over to a clerical assistant who will also verify addresses, spelling, etc.

#### Preparing and conducting radio programs

This activity will include giving talks, writing various kinds of radio script, preparing spot announcements, etc. Good radio public relations will also require occasional visits to and conferences with broadcasting officials to arrange for programs, and to interest them in the library and its objectives.

#### Planning and conducting library campaigns

Library bond elections and other elections in which library interests are concerned furnish public libraries the opportunity to explain their needs, problems and services to the voters. "Book week" is observed by many types of libraries. Campaigns to collect gift books are also common. Sometimes libraries will participate as units in campaigns of general patriotic, civic, or institutional interest. All work of this kind publicizes the library and aids in the development of good relations with the library's public.

### Nonprofessional Duties

#### Keeping publicity records and statistics

Most libraries with active publicity programs will keep statistics of work accomplished. Maintaining a publicity scrap book will require scanning publications and clipping and pasting articles. Statistics kept will include talks, radio programs, quantity of publicity material distributed, etc.

#### Selecting and maintaining publicity materials

Many large libraries will have stocks of publicity materials and equipment for lettering, printing, displaying, etc., which must be selected and kept in systematic order. A file of publicity suggestions including examples of attractive layout, quotations, pictures and drawings will often be maintained.

#### Preparing publicity material for distribution

This includes counting, folding, packaging, addressing and stuffing envelopes.

#### Distributing publicity material

This is largely messenger work which follows arrangements made by the person in charge of public relations.

#### Maintaining mailing lists

This duty includes typing lists from material furnished by the person in charge of public relations, verifying spelling and addresses and other clerical work needed to keep the lists up-to-date.

### Making posters

There are a variety of uses for posters in publicizing library services, such as announcing story hours and other library activities, general publicity in store windows, schools, recreation centers, Chambers of Commerce, etc., and to accompany book displays in and out of the library.

### Miscellaneous art work

The effectiveness of displays and exhibits will depend to a large degree on features of arrangement, color, lettering and accessories. Often a non-professional staff member with art training or a flair for artistic effects will compose and carry out displays working with a professional member of the staff who is mainly concerned with the ideas behind them. In school libraries the help of art students is sometimes available.

## SELECTION OF MATERIAL

The selection of books, periodicals, and other library material, as distinct from their acquisition, requires constant and extensive reading, a broad background of knowledge in the literature, ideas, terminology and leading figures in many fields, familiarity with bibliographical aids of all kinds and a high degree of judgment. Regardless of the type and organization of a library, final selection of material is almost always based on suggestions and specialized knowledge contributed by a number of persons. In a college or university library, faculty members usually have a formal and important share of responsibility. Indeed, in many universities, selection is made almost exclusively by faculty committees. In school libraries, teachers and supervisors at least exert influence on final decisions of selection; in special libraries executives and technicians share the responsibility with librarians, and in public libraries all those engaged in work with readers are in a position to contribute the practical data that are basic to wise selection.

From the standpoint of actual performance tasks involved in selection are closely interwoven with those of acquisition. The process of selection, however, is more decentralized than that of ordering and staff members engaged in any phase of library work may participate. The considerable amount of clerical detail connected with order work, complicated as it may be in a large or specialized library, is not to be confused with the selection process which is essentially professional in character and which includes the following specific duties.

### Professional Duties

#### Formulating policies for selection

This task is basic, involving decisions that determine the character of the collection in relation to the functions of the particular library. School and college libraries, for example, formulate policy as to how closely the collection shall follow curriculum requirements and how much attention shall be given to recreational reading materials; universities determine what subjects shall be focuses for special collections; special libraries decide, for one thing, how much of a general reference collection shall be built up considering other library facilities readily available. Examples of questions of policy making in book selection in public library work are: what, if any, special subjects shall be emphasized; to what extent shall popular public demand influence selection; how large shall branch reference collections be; shall any selection be made in advance of publication; shall the collection include visual, auditory and other materials.

#### Budgeting book fund

Conforming to the general policies adopted by the library the book fund must be budgeted more or less minutely. College libraries often use departmental budgeting and universities may have an additional segregation by college, branch, bureau or foundation library. In many instances, this budgeting is done almost entirely by faculty committees, the librarians serving in an advisory capacity only; in small public libraries budgeting may be merely by such large classes as fiction, nonfiction, children's books,

periodicals and other material, or it may be by subject classes. Large public libraries usually budget first by branches and departments. This requires careful study of circulation in relation to book stock and of other influencing factors.

#### Making and studying surveys of reader interest

This may include special studies made from questionnaires answered by readers who do not use libraries as well as those who do, or periodic surveys of circulation records and reports of librarians working with readers. In libraries of various types the clientele and their interests may differ widely but the basic problem and methods are similar.

#### Investigating and studying school curricula

Obviously this is a basic and continuing task in any library that is an integral part of an educational institution whether on the elementary, secondary or college level. It is performed also in public libraries that cooperate in any degree with public schools, and especially in those county libraries which furnish complete school library service.

#### Investigating community needs

A public library accomplishes this by means of studies of city, county or regional conditions, activities and needs; and of other local library and educational facilities. In the case of a school or college library, members of the "community" are the student body, the faculty and administrative staff; and in a special library - the firm or organization which it serves. In school library work, "investigating community needs" implies keeping touch with curriculum changes and educational trends; in a special library it requires alertness to developments in the particular field and anticipation of demands for printed materials.

#### Selecting materials from book reviews, catalogs, lists, etc.

Reading book reviews and examining catalogs, lists, etc., are means of keeping abreast of current publications and evaluating them through the criticisms of authorities in various fields. In the course of such reading items will be checked for tentative selection, a process not to be confused with clerical checking for titles already in the collection, number of copies, etc. Selection of visual and auditory materials such as films, records and pictures requires a knowledge of reliable sources in these special fields and many considerations of space, timeliness and use. Vertical file material presents special selection problems. Wise decisions concerning material to be included or withdrawn (when it has outlived its usefulness) make a vertical file a valuable reference tool instead of a space consuming collection.

#### Preparing lists of material needed in specific subjects

In connection with book selection, this work is performed when a subject lack or weakness in the collection is discovered. It involves choosing, with the aid of subject bibliographies and critical reviews, the books that best fill the gap or supplement inadequate coverage of the subject.



### Considering requests for specific material

Requests supply a valuable check on desirable material that may have been missed, show trends of reader interest, and possible subject weaknesses in the collection.

### Deciding on extent of duplication of specific material

This requires constant interpretation of library policies and functions, as well as consideration of budget limitations. Although the problem is common to all types of libraries, it is probably most difficult in public libraries where practically all the readers want current best sellers at the same time. In college and school libraries decisions are affected by practices regarding reserve book rooms, or other devices for making collateral reading available to the largest number of students within a limited time.

### Deciding on editions

Since many standard works are issued by several different firms it is necessary to be familiar with the features of format and editing which characterize the work of the various publishers, in order to select those best suited to the needs of the particular library.

### Considering purchase of material sent on approval

In many libraries only an occasional book is received on approval. Publishers, however, send to some libraries on approval one copy of a majority of the new titles on their lists. In any case the decision on material to be retained is part of the process of selection.

### Participating in book meetings

Many public libraries hold meetings of department heads, branch librarians, children's librarians, and sometimes interested laymen or board members, to discuss newly published material and make recommendations or decisions regarding purchase. In schools and colleges such meetings are often held by representatives of the library and teaching staffs.

### Examining dealers' stocks and publishers' displays

From the standpoint of book selection this affords the opportunity to inspect books before final selection and to become familiar with the characteristics of various publishers' lines. See also the same duty title listed under ACQUISITION OF MATERIAL.

### Interviewing salesmen

Librarians concerned with the selection of books and other library materials will frequently need to talk with publishers' representatives and book salesmen. Much valuable information about forthcoming publications may be obtained from them. It will also be a means of discovering the extent and quality of revisions in the case of standard reference works and other facts which may be useful in selecting material. (See also the same duty title listed under ACQUISITION OF MATERIAL.)

### Making final selection for regular orders

When all information, requests, and recommendations are at hand, contemplated orders for new material must be selected according to general policies and budget limitations. This often involves further investigation and comparison of books on the tentative list and balancing the order to cover a variety of needs.

### Preparing basic collection lists

This practice is most general in public libraries many of which compile and maintain lists of children's books or of reference books and standard works that are considered minimum essentials and are bought and replaced automatically.

### Making up fluid book collections

Often locations outside the main library are served by small collections of books which are frequently changed. These may be deposit stations in stores, factories, schools or clubs, or they may be special collections designed to supplement permanent collections. Travelling libraries sent out by state or county libraries make another form of this kind of book collection. To keep these collections alive, fresh and interesting to the particular groups using them is a professional duty which requires a knowledge of books and of the special interests of the location to be served. The collections must be balanced to provide for varying ages and tastes. Records will often be maintained which show where books have been and these will be consulted to prevent duplication. This duty differs from others classified as book selection in that selection is limited to books already purchased by the central agency.

### Examining material for discard and replacement

This involves the exercise of sound judgment based on knowledge of the collection in its relation to the needs of the library. Some of the questions that must be answered are -- is this book obsolete; if so, is it of sufficient value historically to remain in the collection or does it have intrinsic value as a first edition or rare item; should only one copy of this ex-best-seller be retained; should this worn-out book be discarded, or rebound; should this one be replaced or should it be superseded by a new edition or by a more up-to-date book on the same subject.

### Deciding on acceptability of gifts

Most libraries try to conform to a policy of accepting as additions to the collection only such gifts as are compatible with the general content and use of the library. The establishment of such a policy and its application to actual gifts offered belong to the process of book selection.

## ACQUISITION OF MATERIAL

In the acquisition of library material, information and suggestions contributed by all those who aid in selection are gathered together and coordinated so that purchasing, receiving and recording may be carried on economically and efficiently. Skill in the use of bibliographical aids and familiarity with the market and resources of dealers are important factors in acquisition as well as selection. Acquisition of rare books and materials is part of this work requiring highly specialized knowledge. A great deal of judgment is necessary in establishing and maintaining valuable information files and records. Administration of a share of the library's funds is another major responsibility. The librarian must be constantly alert to opportunities for advantageous purchase.

As there is a great amount of clerical detail connected with acquisition work, it is especially important to analyze all processes carefully and assign the routine duties to clerical staff members even if these routines are somewhat complicated to learn. In small libraries, professional and clerical duties relating to acquisition of material will usually be carried on by the same person. In larger organizations, quality or ability and experience of the clerical staff available will determine the amount of responsibility delegated. The tendency to allow routine duties to be performed by professional staff is a natural one since it centralizes information which often must be produced quickly.

### Professional Duties

#### Controlling budget for acquisition

After the appropriation for new material is budgeted (see Budgeting book fund under SELECTION OF MATERIAL), carrying out the plan is a function of acquisition. Expenditure periods are established to provide for a certain percent of the book budget to be spent monthly, quarterly or semi-annually. A bookkeeping system, which in large libraries may be detailed, is set up as means of insuring control.

#### Scheduling purchases

In libraries where the book fund is budgeted by departments and agencies a schedule will be set up to regulate the frequency of purchases, insure a steady flow of new books and to correlate the ordering of the same subjects or the same kind of material. Such correlation of ordering in a large library system contributes to economy and speed.

#### Negotiating with publishers and dealers

Such negotiations by telephone or correspondence involve requests for catalogs of publications; inquiries regarding stock on hand; special discounts to libraries; most convenient and economical means of transportation of material from publisher or dealer to library; correction of errors in filling orders.

### Interviewing salesmen

Salesmen call upon librarians with catalogs and announcements of new publications, giving information about important new titles, probable dates of publication and other information valuable in acquisition. Since interviewing salesmen and publishers' representatives is also a duty of selection, the duty title is also listed under SELECTION OF MATERIAL.

### Examining dealers' stocks and publishers' displays

Librarians of smaller libraries use these visits for both selection and purchase of books and auditory and visual materials. Representatives from acquisition departments of large libraries find visits to book stores profitable in determining types of books carried in dealers' stock and where best to place future orders. Friendly relations with dealers help establish conference for business transactions. (See also the same duty title listed under SELECTION OF MATERIAL.)

### Searching for difficult trade bibliographical information

Full bibliographical information, that is, publisher, price, date of publication, edition, paging, volumes, illustrations, etc., is necessary for selection, purchase and cataloging of books. Professional skill in the use of the indexes and catalogs used in gathering this information is required in order to supervise the purchase of library material.

### Preparing and assembling data for orders

This includes checking publishers' catalogs and announcements and inspection of approval copies sent by dealers followed by consultation with those for whom material is to be purchased and the final authority for approval of purchases.

Detailed bibliographical information must be assembled, and if an order meeting is held, as is frequently done in large public and school library systems, lists must be prepared and material to be reviewed or inspected must be collected. Information is usually finally assembled on order cards which form an important information record during and after the process of acquisition.

### Placing orders

So that he may place orders with dealers or publishers intelligently, the librarian in charge of acquisitions will become familiar with individual firms and their specialties: discounts, special services, such as furnishing approval copies, promptness in delivery, follow-up service on orders, etc.

Where central purchasing is practiced, the librarian furnishes bibliographical data but has no responsibility other than advisory in the decision as to where orders are placed.

### Establishing and supervising order information files

From established files information should be available at all times on the status of material on order. There should be an established routine for following up unfilled or delinquent orders. Special files will vary accord-

ing to demands and the size of the library. They may include: lists of publishers sending books on approval, lists of approved editions, standard sets and a pseudonym file.

#### Verifying and approving book bills

Actual checking of bills with shipments is a clerical task. Knowledge of editions, familiarity with discounts to be expected and changing prices require professional training or expert and experienced clerical help. In any case, this approval of incoming material must be under close supervision of a professional librarian.

#### Maintaining want lists

Want lists will include books and library materials that are out of print or difficult to obtain. Often expensive sets which the library can only afford to purchase at bargain prices are listed. These lists are kept on file and opportunities to purchase the books are watched for. Negotiating with publishers and dealers will often be concerned with these items.

#### Establishing and supervising check lists of serials

In acquiring serials and continuations (material issued over an extended period of time in regular series or at irregular intervals) check lists must be established and maintained to record each number as it is received and to show the library's complete holdings.

Newspapers, magazines, government documents, publications of societies and all pamphlet material may be recorded in this way. Methods used will vary from a simple card file in a small library to an extensive visible file for large holdings.

Actual maintenance of these files is clerical work, but close professional supervision is important in setting up these permanent records.

#### Establishing and supervising exchanges

Libraries often accumulate duplicate copies of books, periodicals and documents which are not needed by them but which may be of value to other libraries. In universities, supervision of the exchange of university publications is frequently handled through the library. While the processes of handling exchanges are routine and clerical, they will need professional supervision and policies and methods must be established especially in libraries conducting extensive exchange activities.

#### Establishing and supervising accession records

Accessioning is briefly explained in the nonprofessional section of ACQUISITION OF MATERIAL. Supervision of this duty consists in deciding on the extent and character of the records to be set up and in seeing that they are properly maintained.

#### Soliciting gifts

Gifts to the library may range from an occasional book or pamphlet to valuable collections of rare books, prints, or maps. In securing gifts the

library will make known to interested readers and members of the community its needs and the special book interests which it wishes to develop. Often there will be an active campaign for gifts and bequests from friends of the library. Material will also be solicited from agencies and organizations which publish in the library's fields of interest.

#### Appraising highly specialized and rare material

Skill and special knowledge are required in evaluating unusual and rare material for universities, business and research libraries and large public libraries giving expert technical reference service. Rare books must be carefully collated and compared by experienced bibliographers in making appraisals.

### Nonprofessional Duties

#### Checking lists with catalog

Lists of books and material suggested for purchase must be checked with the catalog to be sure items are not already in the library, or for bibliographical information in the case of replacements or duplicate orders. Preliminary checking can be done by a nonprofessional assistant. Supervision, review or further search for more difficult trade information may need to be done by a professional staff member.

#### Searching for simple trade bibliographical data

Clerical assistants can, with some instruction, learn how to locate readily available bibliographical information needed in placing orders. Searching for difficult trade information is listed as a professional duty in this section.

#### Making order cards

After all bibliographical information is assembled, it is typed on order cards which will usually include the name of dealer, date ordered, fund to which purchase is to be charged, number of copies and their distribution.

#### Checking order cards with holdings and outstanding orders

This is a final check on orders for new material to be sure no previous order is in process or has been received. Catalog, shelf list, outstanding orders and material in process will be consulted.

#### Typing orders to dealers

After order cards are completed, orders to dealers will be typed from them. Order forms established for the purpose are generally used.

#### Filing order cards

After orders have been typed from the order cards these cards are filed in an outstanding order file to be used as a temporary record until the material is received. When the books are received the cards may be refiled for other record purposes.

### Preparing lists for book meetings

When groups of librarians or book committees meet to discuss and order library materials, lists are usually prepared in advance for their consideration. These lists will vary in the amount of information given: bibliographical data, critical notes, etc.

### Opening and sorting material

When books and other material ordered have been received packages must be opened, material sorted and placed on designated shelves preliminary to checking with the bill.

### Checking invoices

All material received must be checked with original orders and invoices for exact titles, price, discount, number of copies, editions, etc. A non-professional assistant doing this may find it necessary to consult a librarian occasionally since professional book knowledge may be needed to identify ambiguous entries.

### Entering accession information

Records of volumes added to the library giving costs and source of purchase are kept in varying forms: some libraries have accession books in which each book is entered and assigned a number; others may bind copies of purchase order sheets or bills as permanent accession records or keep such information on cards which may be combined with the shelf list. Many libraries will also maintain a classified summary of additions and withdrawals from which the total number of books in the library, or in any agency, or a specific subject class may be obtained. In libraries with many agencies, the classified summary may become an elaborate system of bookkeeping, requiring a high degree of accuracy and facility with figures.

### Returning material to publishers and dealers

Approval copies not purchased, defective copies and items sent in error must be returned. This involves wrapping, addressing and mailing.

### Filing invoices and other order material

The disposal of invoices after they have been checked will depend on the organization of the library. If there is central purchasing the original will be sent to the central office. Duplicates are sometimes used as permanent accession records. In any case it is an acquisition duty to see that approved invoices are properly filed or distributed.

### Following up outstanding orders

Outstanding order files should be checked regularly for items overdue and claims sent promptly. Forms are often used for this purpose. Checking and reporting nonreceipt of periodicals will be a duty of considerable proportions in large libraries.

### Maintaining check lists of serials

Records, usually on cards, are kept of all newspapers and periodicals received. For each number a simple check placed opposite a date on the card form, or a similar entry, will indicate its arrival. Later some of this information will be transferred to a permanent holdings file and may be incorporated in shelf list and catalog.

### Preparing exchange lists

After material of which the library wishes to dispose by exchange with other libraries has been selected, lists of this material must be typed and sent out to designated institutions. (See Establishing and supervising exchanges.)

### Recording exchanges

Libraries conducting extensive exchange activities of their own publications or of duplicate materials will maintain records showing what has been sent and what has been received from other libraries. (See Establishing and supervising exchanges.)

### Acknowledging and recording gifts

Forms or form letters are usually provided for routine acknowledgment of gifts of books, publishers' samples, or other library material. Acknowledgment of especially valuable gifts will be referred to a professional authority.

### Keeping book budget records

In large libraries where many divisions have individual budgets, with limited purchasing periods, a system of bookkeeping is necessary as an instrument of book budget control. The amount of detail recorded will vary. (See Controlling budget for acquisition.)



## CATALOGING AND CLASSIFICATION

Classification and cataloging are the main processes by means of which library materials are systematized and made readily available to users. The professional duties connected with these activities require a high degree of technical knowledge and important personal qualifications. Joseph Wheeler in his Progress and Problems in Education for Librarianship\* says: "To evaluate a book and the author's purpose and to get it to its strategic place on the shelves calls for the highest intelligence and judgment, a rich and rigorous cultural background, imagination, social viewpoint, initiative and resourcefulness, if a potentially useful book is to serve society."

Some nonprofessional duties connected with classification and cataloging are concerned with clerical routines which require mainly accuracy and speed, especially in typing. Nonprofessional duties such as assigning Cutter numbers, cataloging fiction, ordering L.C. cards and filing require more specialized knowledge. The extent to which these professional and clerical duties can be segregated and assigned respectively to professional and nonprofessional assistants will depend largely on the size of the library staff and the volume of cataloging involved. The fact that some of these clerical tasks are frequently performed by professional catalogers does not alert their classification as nonprofessional. Often a careful job analysis will disclose ways in which professional and nonprofessional duties can be separated to advantage.

### Professional Duties

#### Establishing cataloging and classification policies

Cataloging in large libraries will involve policy making on an extensive scale. Even a small library will need to make decisions on policies which will affect the value of the catalog and economy in producing it. Decisions to be made include the duplication of catalogs for departments, to what extent cataloging shall be simplified in the case of fiction and children's books, how extensively music and record collections shall be cataloged, and special treatment of various other kinds of material. General policies in classification will be closely connected with the type of library, the special interests of its users and with the departmental organization.

#### Classifying

Books are classified by assigning them to their proper places in the system of classification used and thus determining their positions on the shelves in relation to other books. Like assigning subject headings, classifying requires a study of the material to determine the specific subject field it covers. In both cases the object is to make the material readily available by bringing it out in the catalog under the most logical

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\* Joseph L. Wheeler, Progress and Problems in Education for Librarianship. (N.Y.: Carnegie Corporation of New York, 1946), p. 60.

subject headings in the first instance and by placing it with like material on the shelves in the second instance. Since these processes are closely allied they are often done at the same time. They both require a knowledge of many subject fields and an understanding of current trends and reader interests. In scholarly libraries especially a knowledge of languages is important.

### Expanding and developing classification systems

Often existing classification systems must be expanded or changed to bring them up-to-date in certain sections or to provide for the fine divisions required in classifying a highly specialized library. Occasionally the material to be classified will be of such unusual character that an entire new system of classification must be devised. A systematic and logical mind is needed for such work. It will be necessary to study the subject or subjects to be covered and often to consult authorities in the field.

### Assigning subject headings

This duty involves (1) careful examination of the publication being cataloged to determine the specific subjects with which it deals and (2) selecting, generally through the use of standard subject heading lists, the words or groups of words which best indicate the subjects under which the material should be listed in the catalog. Frequently portions of a book will deal with subjects not indicated by the general headings chosen. In such cases the cataloger will decide whether the material is useful enough to justify making "subject analytics." Subject headings decided upon will be indicated on the "main entry" card from which the additional cards can be made by a typist. Often standard subject heading lists must be supplemented or modified to suit new or highly specialized material. A file of headings used will be maintained as a guide to consistency.

Subject cataloging is a highly technical procedure. Determining the subject matter of a publication and the term or terms which will express it best often takes a good deal of search and study. The cataloger must know something about many subjects and must keep up-to-date on terminology in many fields. Except in libraries covering limited fields and in very large general libraries a single cataloger will have to deal with the entire field of knowledge. In scholarly libraries a knowledge of several languages is needed. In all cases the cataloger who assigns subject headings must understand the requirements and special interests of the library's users so that the catalog may be suited to their needs.

### Descriptive cataloging

This is the process of making the "main entry" card giving all the information necessary to the complete identification of the book or other item which is being cataloged. The objective of descriptive cataloging is "to design a catalog entry which will present an integrated and intelligible description of the book and indicate clearly its relation to other editions and issues of the book, and to other books recorded in the catalog."\* Often

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\* United States Library of Congress. Processing Department, Studies of descriptive cataloging: a report to the Librarian of Congress by the Director of Processing Department. (Washington: Govt. Print. Off., 1946), p. 25.

the cataloger will need to consult reference works and other sources in the search for correct name forms and other bibliographical information. Descriptive cataloging of rare and early printed material requires very thorough collation so that all identifying facts may be noted.

When this master card has been prepared the process of duplicating it in whatever quantity is needed for added entries and duplicate catalogs can be carried out by a typist.

### Determining added entries

Other cards in addition to main entry and subject cards must frequently be made. These will make it possible to locate in their alphabetical places in the catalog the titles of books and the names of editors, translators, illustrators, etc. Books which include the works of more than one author will often require author and title "analytics." It is a professional duty to determine what added entry cards are required and the exact form of the headings to be used. These are indicated on the main entry card from which the additional cards can be made by a typist.

### Reclassifying

It will sometimes be found desirable to change the classification of large groups of material because of new scientific and technical developments or changes in departmental organization. Such an undertaking becomes a special duty requiring investigation and planning as well as the specific duty of classifying. Occasionally a library will change from one classification scheme to another. Such major projects must be organized and carried out over an extended period.

### Recataloging

It is a professional responsibility to see that the catalog is kept up-to-date by taking into account changing conditions, new terminology and current reader interests. This is a continuing process carried out through investigating criticisms and suggestions from librarians working with readers and from readers themselves. Sometimes it will be found desirable to change the subject headings of large groups of material, or to make changes which will affect many headings in the catalog. Such special projects will need planning and supervision.

### Supervising fiction cataloging

When fiction cataloging is done by a nonprofessional assistant it will be the duty of a professional cataloger to instruct and supervise the work. Instruction will be given in the use of standard cataloging aids, in card forms and other matters. It will be necessary to check name entries carefully. Still closer supervision will be necessary if subject headings are used for fiction. If extensive subject cataloging of fiction is practiced, it will require a professional cataloger.

### Revising cards

Since the card catalog is a permanent record used by many people, every card which goes into it must be checked and errors in form or information revised. Not only mistakes in typing but frequently other errors and

inconsistencies will be caught by the professional cataloger in the process.

### Revising filing

In small libraries filing cards in the catalog will generally be done by the person who does the cataloging. In larger libraries nonprofessional assistants will be taught to file cards according to the standard code used. In such cases their work will need to be checked and revised by the cataloger, who will thus maintain continued supervision of the catalog for accuracy, consistency and condition.

### Supervising physical upkeep of catalogs

Since a card catalog is a perpetual index continually added to and in constant use, its physical condition must be watched. When drawers become too crowded for easy consultation, cards must be shifted and space adjusted. This requires revising labels on drawers and often inserting additional guides. The processes connected with shifting cards must have close professional supervision since the effective arrangement of the catalog is involved. The cataloger will also watch for soiled and worn cards and guides and will see that the clerical processes of removal and retyping are properly carried out.

### Establishing and supervising cataloging records

The librarian in charge of cataloging will need to decide what records and files should be kept and to see that they are kept up-to date. Statistics of books cataloged and other information needed for reports will be recorded. An important record is the shelf list on which is recorded all copies of all books in the library in the order of their shelf arrangement. Larger libraries will have an official author catalog for the convenience of the cataloging staff. Other records may include files of subject headings and cross references used, rules and policies governing specific cataloging problems, Library of Congress cards on order, etc.

### Participating in cooperative cataloging

In order to avoid duplication of effort groups of libraries sometimes enter into an agreement to assign specific cataloging fields to individual institutions belonging to the group. Thus a library specializing in a certain field will catalog the material on that subject for all the libraries concerned. Such cooperative cataloging requires preliminary planning as well as current supervision.

### Supervising contributions to union catalogs and bibliographical centers

Many libraries contribute to union catalogs and bibliographical centers which are established generally by cooperative effort to make library resources in a specific geographical area or a specific subject field more accessible. It will be the duty of the librarian in charge of this to see that such contributions are sent regularly and to make decisions concerning books and other materials to be included.

## Nonprofessional Duties

### Ordering Library of Congress cards

Many libraries purchase the printed catalog cards issued by Library of Congress. In this case the number of cards needed to make all the required entries for a given book must be determined by the cataloger, but the processes involved in ordering the cards can be easily learned and will be done by a nonprofessional assistant in larger libraries.

### Cataloging fiction

It is customary to make only simple author and title entries for fiction and hence this duty does not require an extensive knowledge of cataloging. A good typist will be able to catalog fiction satisfactorily if directed and supervised by a cataloger. If subject heading cards are made, the duty tends to become professional unless only a limited number of standard headings are used. More elaborate fiction cataloging will require a knowledge of subject cataloging and a wide understanding of reader interests.

### Assigning book numbers

A book number is a combination of letters and figures used to arrange in alphabetical order, books having the same classification number. The process of assigning a book number involves the use of the Cutter or Cutter-Sanborn table devised for this purpose and consulting the shelf list to discover whether the existence of other books with the same number will require the addition of a "work mark." In combination with the class number the book number provides a specific designation which applies to one title and no other. Care and accuracy are needed in performing this duty.

### Making cards from main entry

All cards needed to catalog a book completely are determined by the cataloger and indicated on the main entry card. In libraries large enough to permit a division of labor, all additional cards needed will be made by a nonprofessional assistant. These will include all the added entry cards, and duplicate cards needed for branch or department catalogs. In libraries which contribute to union catalogs, duplicate cards will also be made for them. Often the sets of cards needed for a single book will be large enough in number to require some form of mechanical duplication such as mimeographing or multigraphing.

### Shelf listing

The shelf list is a card record of all the books in the library filed in classed order as the books are arranged on the shelves. This record shows where each copy of each book is located and is the record used in taking inventory. Making the shelf-list card will customarily be done as part of the process of making the added entry cards. Once the card is made, additional copies of the book will be recorded on it as they are received.

### Processing added copies and new editions

After a book has been cataloged the processing of copies added later is clerical. Full cataloging information is available if additional cards must

be made. In any case, record of added copies must be made on the shelf list and the subject authority file must be checked for necessary cross references. The nonprofessional assistant doing this work must know how to recognize variations in editions and will consult the professional cataloger who will decide whether variations from copies already in the library are important enough to warrant cataloging as a new book.

#### Filing cards

In small libraries this will be done by the cataloger. Library filing can be learned readily, however, by a nonprofessional assistant who, in larger libraries, will do the original filing subject to revision by a cataloger.

#### Recording withdrawals and reinstatements

When a book is worn out, lost or withdrawn from the library for any other reason, the records originally made for this book must be changed. If the book withdrawn is the last copy this involves removal of cards from the shelf list and from various catalogs in which it had been entered. When books recorded as lost are later found, they must be reinstated on the same records. In all cases the accession record (statistical record of the library's holdings) must also be corrected.

#### Recording transfers

Frequently a book is transferred from one agency or department of the library to another. This requires changing the shelf list and all other records which show the location of the book. If the book is new to the agency receiving it, catalog cards will also have to be made and official name entry and subject heading files checked for cross reference cards which may be needed.

#### Processing recataloged and reclassified books

When books are reclassified or recataloged, the headings and/or class numbers must be changed to conform in the catalog and on other records of the book. These are clerical processes involving erasing, typing and re-marking.

#### Physical maintenance of catalog

In order to maintain the good appearance of a card catalog it will frequently be necessary to replace soiled or worn cards and to make new guides and drawer labels. This will be done under direction of the cataloger who has the ultimate responsibility for the condition of the catalog.

## MECHANICAL PREPARATION OF MATERIAL

The physical processes involved in preparing library material for use have been grouped under this heading. They are concerned with (1) making material resistant to frequent and sometimes careless handling, (2) preparing material for lending and reference use, (3) providing against loss by clear marks of ownership, and (4) indicating shelf location by lettering on the backs of books. It is evident that the physical processes are nonprofessional and require chiefly the ability to do neat and skillful handwork. Since the way in which library materials are treated physically has a direct relation to the effective functioning of the library, the determination of methods and routines is often considered a professional duty. It is quite possible, however, for a nonprofessional worker to specialize in this phase of library work and to acquire the necessary background and judgment to make such decisions and to supervise the whole activity.

### Professional Duties

#### Determining methods and routines

The person performing this duty must know the relative durability and general use qualities of materials such as glue, binder's cloth, paper, cardboard, lettering inks, etc. Books, maps, periodicals, pamphlets, music, records, films and pictures, each requires different treatment in mechanical preparation for use. Frequently it will be necessary to investigate and test new materials and try out new methods. Decisions concerning the treatment of different kinds of library items will be closely related to how they are to be used.

### Nonprofessional Duties

#### Opening new books

This purely mechanical process of making new books flexible by pressing down along the inner margin, a few pages at a time, alternating front and back and working toward the center, until the whole book open readily, adds to the life of the volume. Its purpose is to prevent the cracking of the heavy coat of glue applied to the sewn or bound edge of the book. It is particularly important in the case of finely bound volumes, or books that are over-size, requiring special handling.

#### Collating

New books are examined, often page by page, to ascertain whether or not they are complete and perfect. The extent to which this is done will vary in libraries. Often only very expensive books are collated. In some libraries books, magazines, and newspapers are collated before sending to the bindery; in other cases this is considered the binder's responsibility.

#### Adding marks of ownership

It is the general practice to give new books and printed material an embossed, perforated, or stamped mark of ownership. This gives the full

name and place of the library and is large enough to be readily recognized. The ownership marks generally appear two or three times in each volume.

### Pasting book plates, pockets and date slips in books

For purposes of identification, and to facilitate the handling of circulating material, book pockets and date slips are pasted either in the front or back of each circulating volume. In some libraries book plates are pasted inside the front cover. A special pocket may be added as a container for loose materials such as maps or diagrams, when they are an integral part of the publication.

### Typing book cards and pockets

Books which circulate are usually provided with pockets which hold the book cards needed for circulation records. The details of the information typed on the cards and pockets, such as author, title, copy number, accession number, and, if nonfiction, classification number, will vary in different libraries. It is often necessary to type new book cards and pockets for rebound books.

### Lettering and labeling

In the physical preparation of new or rebound books for use, outside lettering and labeling, usually on the spine, are necessary to insure the proper shelving and location of the volumes and to facilitate their identification. The process involves either hand lettering, the use of the stylus, stencil or branding irons, or the application of printed labels.

### Shellacking

Shellac brushed on the backs of books prevents the ink from drying and crumbling, and in cases where paper labels are used, it seals the edges and prevents soiling. Applied to the entire cover, shellac helps preserve the fabric and brightens the book's appearance.

### Reinforcing

To insure protection of library items requiring special treatment because of their fragile nature or expected excessive use, reinforcing is accomplished by the application of strengthening materials. For example, unmounted maps and the first few pages of the large dictionaries and encyclopedias are often strengthened by a linen or gauze surface. If a book is not well bound and heavy use is anticipated, hinges may be added or it may be re sewn with linen cord and reglued. Pamphlets which circulate may be reinforced by the addition of hinged backing or they may be mounted in pamphlet binders. Pictures must be mounted on cardboard.

### Making covers and containers

Many libraries make a variety of covers and containers to protect or store periodicals, pamphlets, expensive plates and material of odd dimensions. These include pamphlet and magazine covers made of stiff cardboard, pamphlet boxes, portfolios and scrap books. Making these requires skillful and neat handwork.



## REGISTRATION AND CIRCULATION

In all libraries where material is lent to be taken from the building, some established process for registering borrowers is necessary. While planning registration procedure is policy making, administrative in nature, it is discussed here because of its specialized application. The process becomes increasingly elaborate with the size of the library and the number of borrowers served. A large public library needs more safeguards in establishing borrowing privileges than a university or school library which can depend upon student records already established. A special library serves a limited well-known clientele and may be flexible in its rules. A small public library, even though it does not need the safeguards necessary in a large city, generally holds to established procedures so that all borrowers using a tax-supported institution may share equal privileges and responsibilities.

Circulation routines may also vary greatly with the size and organization of the library. Some libraries will employ mechanical devices of varying kinds. In any case desirable features to be considered are: accessible, accurate and easily used records of books in circulation, rapid and efficient service to borrowers, economy of working time. A well-planned routine for recovering overdue items is essential.

In larger libraries, registration and circulation routines may be segregated and carried on by special clerical staffs organized for that purpose. In any case, registration and circulation work is nonprofessional in nature, requiring first of all, familiarity with good clerical procedure. Where this work is assigned to nonprofessional staff, however, some professional supervision is required in order that administrative policies may be clearly understood and followed.

### Professional Duties

#### Making rules and regulations for lending

Rules for lending in any library are usually the result of a long evolution, growing and changing with changing circumstances. A newly established library will probably follow the general pattern of one of similar size and purpose, and then will gradually build its own special procedures. Careful thought and planning are of primary importance here since library property must be protected and at the same time the borrower's good will and satisfaction must be considered.

#### Revising and editing rules

Changing conditions will necessitate frequent revision of rules. Shifts in population bring new types of borrowers; new industries mean different working and leisure hours. Changes in curriculum and educational policies influence rules in school and college libraries. As the library collection grows, more books may be available and the loan period may be extended. When new rules are made, they must be carefully edited for clarity and consistency.

### Planning forms and records

Forms, such as borrowers' applications, borrowers' cards, postal notices, letters, etc., should be carefully worded and spaced, clearly printed and attractive. In a large library where many forms are in constant use, this duty requires considerable time.

Forms for records of circulation may be few and simple or many and detailed, depending upon the size and type of the library.

### Supervising interlibrary loans

Material is often borrowed by one library from another to fill special requests. Professional judgment is necessary in obtaining correct data and in deciding what to borrow and where to borrow. It is also important in deciding what to lend.

### Supervising reserve book collections

In college and university libraries when books withdrawn from the general collection are placed on reserve with special limits on their use in order to serve the largest possible number of students, special records are kept. The duties involved in supervising this work are part of circulation procedure.

Other libraries employ various methods in reserving books for use in the library or to lend to borrowers upon request. Systematic routines, carefully supervised, are important.

### Preparing statistical reports

Statistics of circulation generally broken down by subject classes are kept by most libraries. Public libraries especially, will record the number of borrowers registered. Such statistics are important for measuring the growth or decline in use of the library and for comparison with other libraries. Other records connected with circulation include reserve requests taken, overdue notices sent, and number of books lost in overdues. In public libraries occasional studies in the use of the library will require information on the age, sex or occupation of borrowers in relation to the kind of books read. The extent and kind of records concerned with borrowers and circulation will vary with the kind and size of the library. Deciding on the statistical data needed and organizing and interpreting them in reports to authorities is a professional duty. Compiling the data is a routine clerical task.

### Handling complaints

When rules are misunderstood or when, for any reason, a reader feels he is not being fairly treated, explanations and decision are professional responsibilities. Usually minor difficulties may be handled by competent clerical workers, but an appeal in time to higher authority saves many situations.

Setting up the desk

This duty will vary in detail according to the charging methods used. Dates to be stamped on outgoing and returning book cards, date slips and readers' cards must be changed and calendars adjusted. Supplies needed must be put out and the desk cleaned for the day's work.

Issuing, renewing and receiving books

Various methods are used in issuing material to borrowers. A record of date of issue or date due is necessary for the borrower and for the library. The library must also keep records by which it may easily ascertain the name of the person to whom material has been issued.

Many libraries reissue or renew material. The renewal process consists of changing the date due to show an extension of the loan period.

Receiving includes clearing the record if a borrower's card is used and collecting fines which are penalties charged for overdue or damaged items.

Discharging books

The discharging process will vary according to the type of charging system used. All books that have been returned must be cleared of the charge to the borrower. Usually this is done by replacing in the pocket of the book a book card which has been filed by date and class or in alphabetical order during the loan period.

Collating special books

To assure the protection of books of special value it is a practice in many libraries to examine them for completeness and condition each time they are borrowed and returned.

Sorting and filing book cards

At the close of each circulation period, usually each day, book cards for the books lent that day are collected and sorted for counting and entering in the circulation record.

Counting and recording statistics

Books and materials lent and renewed during each circulation period are counted by class or some other designated division and the count is recorded to be compiled later in weekly, monthly, or annual statistics.

Receiving and recording money

Most libraries which lend books receive money at the loan desk in payment of fines for books kept beyond the loan period and for books which have been lost. Other receipts may be deposits required from borrowers of unusually valuable material, and in public libraries fees charged to nonresident borrowers and receipts from books in rental collections. Temporary records of money are kept and later entered in the permanent cash record.

### Keeping cash records

Records of money collected are kept by established periods: daily, weekly, monthly, etc., and reports made as required by the governing agency.

### Typing and verifying filled book cards

Cards that have been used until all lines are full are copied and verified with the old cards or with the books to which they belong.

### Reserving books

This duty includes recording items to be reserved and locating them in the library or through circulation and other records, or obtaining them from another agency. Placing them in a reserve collection where they will be available to borrowers upon notification is a succeeding routine. In a university library where reserve book collections are large, it may require the bibliographical knowledge of a librarian to locate some of the material.

### Issuing overdue notices

When books or other library material have been kept beyond the loan period, a reminder is usually sent to the borrower. This may be a form postal, an interoffice communication, or a note to a student. Second and third notices or telephone calls may follow, and finally, a messenger may be sent. A definite schedule is generally set for this routine, which ends with the return of the material, payment for its loss, or a delinquent record being placed against the borrower.

### Maintaining interlibrary loan records

When material is borrowed or lent between libraries, complete records are kept of requests sent, material received, return dates, and transportation or service charges.

### Registering borrowers

Registering new borrowers involves assisting the borrower to fill out the application form correctly and explaining the library's registration rules. When the registration form has been completed, the borrower's card and any other registration records kept by the library are made from it. Special care must be taken in registering children in public libraries.

### Explaining lending rules

This is generally done by those directly concerned with registering borrowers and charging and receiving books. Personality is of utmost importance here, since a careful, friendly explanation is the best possible introduction to the library. Often printed folders explaining the library's rules and services are given to the borrower to supplement verbal explanations.

### Maintaining registration files

Borrowers' files in public libraries generally consist of the application form filed by the borrower's name, supplemented by a numerical record.

New applications must be verified to see that the borrower has not been previously registered. Files must be kept up-to-date by correcting addresses and withdrawing expired cards.

Large public library systems with many agencies usually maintain master files of all registered borrowers to avoid duplication, to facilitate transfer of borrowing privileges from one agency to another and to provide central records of fines and delinquencies.

Libraries with limited clientele will maintain very simple records of borrowers. Often no records aside from those of the institution or organization served will be needed.

#### Compiling data for statistical reports

Statistics concerning borrowers, circulation, overdue books and data of similar nature are compiled from daily records to be used in monthly and annual reports. (See Preparing statistical reports.)

## REFERENCE WORK

"Reference work includes the direct, personal aid within a library to persons in search of information for whatever purpose, and also various library activities especially aimed at making information as readily available as possible."\* In the latter category the building up of the reference collection is most important. This, however, is primarily a function of book selection and is included under SELECTION OF MATERIAL. Some duties which are also closely allied to reference work will be found under ASSISTANCE TO READERS.

The reference use of the library in locating information requires a wide knowledge of sources of information, and familiarity with reference techniques. Few readers have more than a slight acquaintance with either. Moreover, the wide scope and complexity of the collections of large public and research libraries often present problems for even the experienced research worker.

All types of libraries, therefore, provide reference service, though the reference function may not be performed by a separate department in all. In the very small library and in school libraries reference work may be done by any professionally trained staff members. In large libraries there may be a separate reference department. In libraries which are departmentalized, reference work will be done by the professional personnel of each department. Reference service in very large university and research libraries may be organized in divisions based upon class of material, such as periodicals, newspapers, maps, manuscripts, rare books, or upon a single subject such as literature, or upon fields of knowledge such as the social sciences or the humanities. The trend toward subject departmentalization in large public libraries and divisional organization in university libraries has brought a corresponding trend toward the provision of subject specialists, bibliographers and research librarians for more expert services.

The reference duties in all types of libraries are essentially similar though there are wide variations in the kind of aid given depending upon the nature of the clientele which is served and the policies and resources of the library.

### Professional Duties

#### Establishing reference policies

This duty, which is administrative in nature, involves decisions determining the organization of reference service, the groups to be served, and the extent and kind of service to be given to individuals. It also involves the formulation of rules and regulations to implement the policies established. Policies concerned with book selections are discussed under SELECTION OF MATERIAL.

In small libraries reference work may or may not be organized into a separate department. In large institutions decisions will have to be made as to

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\* Margaret Hutchins, Introduction to Reference Work (Chicago: American Library Association, 1944), p. 10.

the desirability of breaking up the service by form or subject or a combination of the two, or in college and university libraries, by department, professional schools, or divisions; and if department organization is adopted whether or not there shall be a general reference service. Matters of staff specialization for expert assistance to readers are also involved.

Policies governing the extent of reference service to readers other than the library's own special clientele include for colleges and universities, decisions as to how much reference service can be given to members of the college community, and to alumni; for public libraries the nature of its service to school children, and to college students. Both most formulate policies regarding service to industrial concerns and governmental institutions, and correspondence requests.

Policies regulating the amount and kind of reference service require decisions as to the time to be spent on individual requests, the kind of assistance, directional or personal, and whether or not such services as copying articles, translating, and special research assistance are to be given.

#### Answering reference questions

Reference questions are of two general types, informational and bibliographical. Both types have a wide range in difficulty varying from those which can be answered by brief consultation of general or special reference tools to elusive and involved questions which require extended searching in many sources both within and without the library.

Both types of questions are common to all libraries, but there is considerable variation in the predominant kind of question asked, easy or difficult, popular, technical or scholarly, depending upon the public which the library serves. In libraries connected with educational institutions the librarian will more often direct the student to sources of information and indicate procedures for securing the answer to his question, while in a public library the librarian will usually locate the information for the inquirer.

Reference service may include locating materials and suggesting resources in other libraries. This involves the use of union catalogs, union lists of various kinds, the services of bibliographical centers, and arranging for photographic reproduction of rare materials.

While research as properly defined is not a common reference function\* occasionally public libraries engage in research for a governmental agency and university libraries offer research assistance to faculty members.

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\* Research requires "The scientifically accurate discovery, collection, analysis, evaluation and interpretation of data, and results in a conclusion based on related facts which, so far as records show, has never been drawn before." Margaret Hutchins, Introduction to Reference Work (Chicago: American Library Association, 1944), p.17.

## Instruction in reference sources and methods

One of the most important reference functions, especially in libraries connected with educational institutions, is teaching inquirers how to help themselves. This involves instruction in the sources of information, in the use of bibliographical tools such as catalogs and indexes, and in the techniques of searching.

While a great part of such instruction will be individual and informal, formal class instruction will frequently be given, especially in libraries of educational institutions. In universities special courses for graduate students in subject bibliography and techniques of research may also be provided.

## Compiling bibliographies

The preparation of bibliographies is a common reference duty in all libraries. Some bibliographies are compiled at the request of individuals or organizations, while others are initiated by the library itself. Most libraries maintain continuing bibliographies on subjects of local interest such as lists of references on the institution or the city which the library serves.

Bibliographies will vary from short lists of books, periodical articles, and pamphlets for the general reader to long lists of scholarly or technical materials for research workers, technicians, officials and other specialists. Many bibliographies will include annotations describing and evaluating the materials listed. The compilation of reading lists as a reading guidance service is classified under ASSISTANCE TO READERS.

## Organizing and maintaining information files

All libraries find pamphlets, clippings, maps, pictures and other more or less ephemeral materials useful in answering inquiries of patrons. This material is generally arranged in vertical files and kept up-to-date for effective use.

Various other files such as card files of directory information, of answers to questions that have been difficult to find, special subject and title lists, and records of holdings of unusual and rare materials in the region are kept by most libraries.

Special libraries make extensive use of information files of current statistical data and bibliographies in their particular field and often maintain indexes of these files.

## Making special indexes

Indexes of special collections, local publications, archives, manuscripts, and other special materials not already indexed are made in order to facilitate the use of such materials by the library's clientele.

## Verifying bibliographical data for interlibrary loans

While many requests for interlibrary loans require only routine verification and may be done by an experienced nonprofessional staff member, others require extended searching in bibliographical sources. The location of rare



materials also requires use of special bibliographical tools and may involve locating information incident to securing photographic reproductions.

### Contributing to bibliographical projects

One of the important ways in which libraries can aid in reference and research is by furnishing lists of their holdings to local, regional, or national bibliographical projects in order that scholars and other may be able to locate materials needed. This often requires checking in the card catalog and in uncataloged special collections, lists of materials wanted which are not included in existing lists. (See also Supervising contributions to union catalogs and bibliographical centers under CATALOGING AND CLASSIFICATION.)

### Nonprofessional Duties

#### Locating simple bibliographical information

This involves checking the card catalog, book catalogs, and periodical indexes for publication data (author, title, publisher, date, etc.) needed for bibliographies. This duty is performed also in connection with the preparation of reading lists and for this reason is repeated under ASSISTANCE TO READERS.

## ASSISTANCE TO READERS

Many of the duties listed here express the function of the library as an instrument of adult education. They include all the services which help in the effective use of the library for reading in contrast to activities connected with answering specific questions or locating particular information which are classed as REFERENCE WORK. ASSISTANCE TO READERS can be divided into two classes: the one directed to the individual and the other to groups of readers or potential readers.

The important function of fitting books to the personal needs of the individual reader is the purpose for which many of the duties are performed. The culmination of all library services comes in the direct, personal contacts between reader and librarian. More than any other phase of librarianship, this one is, therefore, reader centered.

In many public libraries a program for adult education is also developed through work with groups. This approach has the advantage of reaching large numbers of people. Sometimes a library will work through organizations already formed with specific interests which may be promoted through books, and sometimes through library initiated discussion groups, film forums or lecture courses.

While most tasks performed in offering reading guidance to boys and girls are the same as those for adults, there are a few limited to this age group alone. In carrying out these special duties the library recognizes its responsibility as an educational agency to promote a wider and more understanding use of books and libraries; to develop desirable reading habits and tastes in boys and girls; and to teach the use of libraries and books as tools of learning. The performance of such special services presupposes on the part of the librarian an interest in and extensive knowledge of literature for children and young people, an understanding of child psychology and a knowledge of educational trends and interests.

### Professional Duties

#### Explaining to readers the arrangement and resources of the library

To welcome the new reader and to acquaint him with the collection is the librarian's first important contact. The reader is shown where books and other materials are located and how they are arranged. The librarian also points out locations, indicates the extent of the library's resources, its special collections, the kind of assistance offered to readers, and the various services available. When introducing large numbers of people to the library, as at the beginning of a school term, the librarian often schedules tours or shows orientation films. Frequently libraries prepare printed guides and handbooks describing their collections for the use of readers.

#### Assisting readers to locate and select books

In any kind of library it will be a professional duty to assist readers in finding and selecting books. The kind of situation which brings a librarian, a reader and books together in the reading room, at the desk, or at the shelves is an opportunity for reading guidance which may be casual but is

often important, especially in a public library where many readers come without specific books in mind. Skill in questioning combined with insight and the ability to fit a book quickly to the reader's need are required in performing this duty. Often the librarian's knowledge will supply a satisfactory substitute when a specific book asked for is not available. Sometimes other interests which can be aided by books will come to light and lead to continuing opportunities for reading guidance.

#### Assisting readers to use card catalogs

In helping a reader to select books there is often opportunity to explain to him the arrangement of the card catalog and how it can aid him in his use of the library. The librarian shows the reader the various headings under which the information about a book is entered in the catalog, explains the content of the card and the significance of the call number. In addition to the general catalog there will often be special catalogs and indexes about which the users of the library will need to know.

#### Individual reading guidance

By reading guidance is meant something more than the casual recommendation of books given by the librarian who is assisting readers at the shelves. In the case of adults it generally involves an informal conference with the reader to discover his reading interests and background and his purpose in asking for assistance. Often the situation will be met by the suggestion of one or two appropriate books. Sometimes a planned reading course is needed. In this case, the librarian will select suitable books, supply comments on them, and suggest the order in which they should be read. The reader's progress will be followed and often additional advisory consultation will be given.

When guiding the reading of boys and girls the librarian seeks to develop satisfactory attitudes toward books and desirable reading habits and tastes and selects the book to fit the individual child's particular interest and capacity. This involves studying children's interests, aptitudes and hobbies, as well as their reading levels and abilities. Knowledge of the school curriculum and the subjects emphasized at different age levels contribute to an understanding of needs and interests. Consultations with teachers and parents may be helpful.

Public libraries frequently provide special reading guidance for young adults to assist them in making the transition from juvenile to adult books. This requires a study and understanding of young people's interests and a wide knowledge of adult books suitable for them. Reading guidance for whatever age group requires familiarity with the contents of books and a personal enthusiasm for reading on the part of the librarian.

#### Furnishing information about books, authors, publishers

This task includes supplying information about publishers, their specialties and publishing interests; the comparative value of different publications in a single subject field; or informal, objective evaluations of an author. It involves, also, recommending reference books for home purchase; suggesting trade journals to which a reader might subscribe for aid in his business; or making evaluations of editions of standard works. Readers often turn to the library for this type of information. To supply it the

librarian draws upon a broad background of knowledge of the book world.

### Informing readers about books relating to their special interest

In continuing the reading guidance developed individually, or through an adult education program, the librarian makes note of the special interests of readers and calls their attention to new or important material as it is received in the library. In small libraries the record of special interests may be kept informally and the reader notified personally, but in larger institutions reader interest files are kept by subject and the reader notified by phone or mail as the material is received. Educational institution libraries usually limit this service to members of the faculty and to graduate students.

### Abstracting printed material

This duty is performed to some extent in most types of libraries but is particularly common in research and special libraries where the librarian is frequently asked to digest and summarize the essential points of a book, pamphlet or periodical article.

### Conducting group activities

Recognizing the library's responsibility as an agency for adult education, many public libraries initiate and conduct lecture courses, discussion groups, film forums and book reviews. These involve planning, securing speakers and discussion leaders, publicizing the events and seeing that there is effective coordination with books and the use of the library.

Special projects will be planned to extend children's reading interests. In a public library they may serve to encourage summer reading and a wider use of the library while in a school library they are often related to some class room activity. As with adults, discussion and study groups or dramatic, hobby or literary clubs are one means often used to stimulate children's reading. Other projects are developed by various types of programs such as book talks and reviews given by the librarian, talks by children's authors and illustrators, radio and quiz programs, dramatizations of books, book films, transcriptions of stories or Book Week celebrations. As in the case of adult group activities, the librarian is responsible for the over-all planning and general supervision of the groups; for selecting materials, scheduling meetings and arranging publicity. In the case of dramatizations she often trains and directs the children participating.

### Cooperating with groups

Since many organizations have interests and activities which can be advanced through books, public libraries especially find them effective instruments for extending the use of the library. Such groups include those interested in parent education, social welfare, labor, civic affairs and national and international problems. Cooperation may consist in preparing special reading lists, assisting with programs, arranging book displays or even circulating books at meetings.

### Giving talks on books and reading

This practice is widely followed in all types of libraries to introduce library resources to readers and to encourage and stimulate an interest in

reading. Talks may be initiated within the library or given on request to community organizations of many kinds. Often they will be given over the radio. Book talks at parent teacher association meetings or at educational conferences, for example, may be planned to inform parents and teachers about new titles, standards of selection, or trends in publishing of books for children. For whatever purpose they are given, preliminary study of the books to be reviewed will be necessary and careful attention must be given to organization and presentation of the talk.

### Planning and conducting story hours

The primary purpose of all library story hours is to interpret literature to children and to inspire them to read for themselves. To this end, story hours are scheduled weekly in many libraries and carefully selected folk tales, legends, or realistic stories are adapted for telling to small groups by the librarian. Story telling is an art which requires serious preparation and some innate ability. The story teller is responsible for the selection, the adaptation, preparation and presentation of the stories and the planning of a well-balanced program.

### Scheduling and conducting classes in the library

This practice offers a means of providing either individual or group guidance for children and students and an opportunity for the librarian to participate in the teaching program. In the public library the librarian may plan a book talk or a story hour especially if the age group is young. Again, a lesson on the use of the library, or a series of lessons on reference tools and sources may be prepared and conducted. In school and college libraries orientation lessons are often given to all entering students. Throughout the year classes may be scheduled for regular periods in the library or teachers may arrange for class use of the library as special needs arise. In helping students with class or seminar assignments the librarian often makes comparative evaluations of books and other materials and points out authorities in special subject fields. Class visits to either school, college or public libraries require advance planning by librarians and instructors together, the preparation of schedules, cooperation with the teachers on lesson plans and often the preparation of special book collections or displays.

### Coordinating the library with the educational program

This duty is the particular concern of school, college and public libraries and, in some cases, even special libraries. For the most effective use of the library by students, the librarian needs to be informed about the educational program of the institution or community of which his library is a part, and in turn, he needs to inform instructors and teachers about the resources of the library. The duties are similar though the relationships are closer and more frequent in the case of school and college librarians than in the case of public librarians. In addition to investigating and studying changing school curricula, the librarian visits administrators and teachers to get acquainted, to talk over plans for book service, or to confer about reading interests and abilities of individual students. The school and college librarian often serves also on curriculum committees.

Librarians visit classes to introduce the library to the students. They may give book talks or reviews, or explain the library's services and rules.

Visits may also be made to determine current interests of the teaching faculty and curriculum needs as well as to fill specific requests. The librarian sometimes works with student committees in selecting books, pamphlets and periodicals for special studies. Collections of books in specific subjects are selected by the librarian, often with the aid of the instructor, and sent to class rooms for temporary use.

### Compiling and distributing reading lists

Reading lists help to stimulate and direct reading and are a means of offering some kind of reading guidance to large numbers of people. Subjects chosen generally reflect current problems or interests or they may be selected for special groups or a special occasion. In such cases the librarian takes advantage of an already developed group interest to stimulate reading. The preparation of a reading list involves examining numbers of books, looking up other lists on the same subject and selecting the best titles for the purpose. Often the lists will be annotated with brief statements about the content. Sometimes they will be classified under appropriate headings. Quite as important as preparation is seeing that these lists reach the groups or individuals who can use them to advantage. To this end, careful planning is needed to secure effective distribution.

### Planning book displays

Displays within the library offer an opportunity to link books with current interests, call attention to special subjects which may attract readers, or show the extent and variety of the library's resources. Frequently readers may lend to the library books and other material suitable for exhibits. Often effective exhibits are prepared by combining objects and books. Planning displays involves deciding on the topic or subject matter to be used, selecting suitable books, and preparing whatever headings, quotations, or descriptive wording is needed. Such displays are primarily made to assist readers in the choice of books. Displays planned for the purpose of publicizing the library are classed under PUBLIC RELATIONS.

### Maintaining information bulletin boards

Bulletin boards provide a means of calling to the attention of readers educational and cultural opportunities available in the community. The extent to which libraries provide this service will vary widely. Some will be active in securing announcements of events and courses and will maintain close contact with organizations sponsoring adult education programs. Often time will be spent in scanning and clipping newspapers for news of lectures, concerts and educational events.

## Nonprofessional Duties

### Giving directional information

Giving directional information is a form of assistance to readers which requires chiefly a knowledge of locations in the library, a flair for interpreting questions which are often vaguely or inaccurately worded, and the ability to give clear and concise directions. In any large library used by many people giving directional information is a constant duty. When nonprofessional assistants are stationed where they meet the public, as at the loan desk, this duty will also require judgment in deciding what questions

need to be referred to a librarian.

#### Locating simple bibliographical information

The process of preparing reading lists often requires finding information such as publishers, dates, call numbers, and other facts readily found in the catalog or other sources designated by the librarian preparing the list. Such work, sometimes extensive and tedious, can be adequately done under direction by a nonprofessional assistant who has been trained to use catalogs and bibliographies.

#### Arranging bulletin boards and displays

This duty requires neatness, a sense of balance, design and color, and skill in lettering. (See Planning book displays and Maintaining information bulletin boards.)

#### Maintaining audio-visual services

Audio-visual services provided by libraries include pictures, slides, records and films. Some of these services involve equipment which requires skill in handling. Films and records must be regularly inspected, cleaned and repaired. The use of listening rooms for piano scores or records must be scheduled and supervised. If the library sponsors film forums, the operation of a projector is involved.

## PHYSICAL UPKEEP OF MATERIAL

Keeping books and other library materials in good physical condition is an activity common to all libraries, although the chief problems of physical upkeep will vary in different kinds of libraries. The library which contains many rare but seldom used volumes will be most concerned with such matters as treatment of paper, care of leather bindings, maintenance of correct atmospheric conditions, and protection against vermin, while public and school libraries where books are in constant use will concentrate on the processes of mending and cleaning which will result in getting the maximum use from a book before it has to be discarded or rebound.

In the latter type of library physical upkeep duties are arduous and continuous. The work will require neatness, manual dexterity and a knowledge of methods to be used in various situations. These requirements are obviously nonprofessional in character. In the case of rare and expensive books more technical processes are involved and it will be a professional duty to understand and evaluate them, even though the actual work is done by nonprofessional staff members.

In any library policies concerned with physical upkeep must be established on a professional level. This is true also of decisions on methods to be used and the general supervision of physical upkeep processes.

### Professional Duties

#### Determining methods and techniques for preservation

This requires keeping abreast of improvements and changes in this field through professional and technical publications. The problems involved are simple in many libraries but are technical and complex in libraries that have original material, rare books and microfilms, for example.

#### Establishing policies concerning binding, mending and discarding

As these policies have a direct relationship to the functions and objectives of a library they are of administrative and professional importance. Their formulation requires knowledge of the value and usefulness of old as well as of current material in a particular library and judgment in weighing relative advantages of binding, mending and replacement.

#### Preparing binding specifications

The library profession has simplified this duty greatly by preparing and adopting "minimum specifications" for library binding.\* As these are revised infrequently, however, they often require modifications for current use.

Libraries having original material and old and rare books with fine bindings usually need to establish special procedures for the care and preservation of such valuable items.

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\* See Minimum Specifications for Class "A" Library Binding. A.L.A. Bulletin 32:777, October 15, 1938.



### Making final decision on items to be bound, mended or discarded

The duty is professional to the extent that decision requires knowledge of the value of books from the standpoint of demand, content and rarity. It also requires judgment as to relative costs and feasibility of binding and mending, the extent of usefulness, both present and potential, of the items in question and the possibility of replacement.

### Negotiating with binding agent

Negotiations concern such matters as price, standards of materials and workmanship and the length of time the material must be inaccessible. The negotiations may be merely verbal or they may involve detailed contracts.

### Supervising upkeep processes

This duty includes checking on the quality of work done for the library by commercial or other binderies and on the efficiency of the mending and preservation methods within the library. Occasional conferences on the physical condition of the library collection will stimulate suggestions for improvements in methods and procedures.

## Nonprofessional Duties

### Preliminary sorting

This duty includes the sorting of books that are in poor condition, into large groups consisting of those which are completely worn out, those which must be rebound if they are to be retained in the collection and those which can be mended if it is decided they are worth the time. The final sorting has been described under the professional duties section.

### Cleaning and treating for preservation

Books in constant use require frequent cleaning of both covers and pages. This is done by washing, erasing and using various commercial cleaners. Special skill and knowledge of materials and methods are necessary where rare books are concerned. Certain bindings such as leather, sheepskin and vellum require special treatment at intervals to prevent drying and cracking.

### Repairing

This duty involves a careful examination of the book or other item to be repaired, deciding on the kind of treatment needed and selecting materials best suited to do the work. The rest is a matter of neat and careful handwork and skill in the use of book repair tools and equipment. Repairing includes such processes as mending torn leaves, inserting loose leaves, sewing in loose signatures, recasing books which have broken away from their covers, putting on new backs and covers, reinforcing fragile maps and plates. Repairing rare items will involve special care.

### Duplicating missing pages

When a book has one or two missing pages but is otherwise repairable, the missing text is sometimes typed from a duplicate copy to be put in the proper place when the volume is repaired or rebound. Some libraries

reproduce missing pages by a photocopying process.

### Disinfecting books

This consists of disinfecting by one of several approved methods, books which have been in quarantined houses or in possession of some one with an infectious disease. Most health authorities now agree that exposing the pages to sunlight is all that is necessary and many libraries no longer fumigate books.

### Preparing material for binding

The amount of detail involved in this work varies according to existing agreements with binding agents. In the case of newspapers, magazines or serials, the task includes arranging and tying together the separate items that are to be bound in each volume and indicating exactly what is to be printed on the cover. The binder usually has a detailed record of the library's previous bindings so that uniformity of appearance is maintained without repeated instructions. If advertising sections are to be removed it may be done by the library or by the binder. Unless the binder agrees to supply missing numbers, title pages and indexes, securing them is included in this library duty. Preparing books for rebinding includes removing pockets and date slips, examining to be sure that no pages are missing and indicating the material, color and the lettering to be used.

### Keeping bindery records

Part of the bindery process consists of keeping a charge record of the titles and volumes of materials sent to the bindery, and discharging them when they are returned. Records showing the number of circulations before binding and between binding and discarding are often kept, as a guide in formulating policies in physical upkeep. A check of the materials against the binders' invoice is made when shipments are returned.

### Inspecting books returned from the bindery

This consists of examining the volumes to see that they are complete and in the case of periodicals and other serials, that the numbers are in proper sequence. The printing on the cover must be checked to be sure it is correct and the quality of materials and workmanship will also be examined.

### Disposing of discarded material

Discarded books and other material are often sold as waste paper. In the case of discarded books, a preliminary task is often that of removing and destroying the covers. Sometimes the disposal of discarded library material is handled by some other agency of the jurisdiction of which the library is a part.

## CARE OF SHELVES AND FILES

The usefulness of any library collection depends upon the ease and speed with which books and other library materials can be located when needed. To this end, books are shelved according to some predetermined classification and in relative location to others within the collection. Problems incident to shelving and filing oversize books, documents, maps, posters, and other nonbook materials such as films, music, microfilms, require special care. Again, it is a particular problem to keep ephemeral vertical file, and pamphlet materials in order. Prerequisite to competent care of shelves and files is a clear understanding of the classification scheme in use. Since a misshelved book is for practical purposes a lost one, the care of shelves is an important although time consuming duty in any library. It makes especially heavy demands upon the staff in libraries where readers have free access to shelves.

### Professional Duties

#### Planning shelving arrangements

In planning shelving arrangements the librarian takes into consideration such matters as the kind of readers, frequency with which materials are called for; kind and type of materials to be shelved in relation to available space; kind of shelf labels and directional guides to be used and the location of them. Libraries with open shelves plan arrangements with a view to serving readers' interests directly from the shelves, whereas, with closed shelves the emphasis is on arrangements that will insure quick delivery of books from the stacks. Special arrangements are necessary in some cases to control the use of rare books or those in unusual demand for limited periods. Decisions as to the best methods of housing pamphlets, documents, maps, films, manuscripts, require expert knowledge. Besides providing for current shelving needs, plans for growth and future arrangements must be made and space for this estimated in accord with accepted standards.

Rules to implement shelving arrangements and to hasten service to readers cover such items as length of time books are allowed to accumulate before shelving; how they are sorted and arranged to expedite shelving; what access readers may have to books awaiting shelving; how often shelves are to be inspected ("read") for correct order of the books; where shelf labels and location guides are to be placed.

When shelves become overcrowded for such reasons as sudden growth of the library in certain fields, acquisitions in special fields, or because of seasonal use of materials, an expeditious plan for shifting the collection, or any portion of it must be made.

#### Planning and supervising book inventory

A systematic check of the book stock is made at regular intervals to ascertain which books are missing and how many are missing. Care in planning and scheduling this task insures its completion with the least interruption to library service. In supervising the inventory the librarian often discovers books and editions which should be discarded and discrepancies in

cataloging or errors in records which require correction. A report of the information revealed by the inventory is useful in determining what replacements are needed in the book stock and whether the library's provisions for protection of its materials are adequate.

### Supervising shelving procedure

This duty is concerned with when and how books are returned to their correct locations after use. In large, busy libraries regular schedules are prepared and work flow carefully planned to insure prompt availability of books, but in smaller and less used collections this duty is less time consuming. Where heavy demands are made on certain portions of the collection for limited periods, as in reserve book collections in college and university libraries, close supervision and more frequent scheduling of shelving is necessary. Large libraries generally set up regular search schedules for misplaced or misshelved books; in smaller libraries the procedure is less formal.

## Nonprofessional Duties

### Shelving and filing

Books, pamphlets and other library materials must be sorted and returned to their proper location after use. Methods of doing the job vary greatly, but arrangement on the shelves follows the library's classification scheme except for such materials as oversize books, microfilm, maps, records, magazines, pictures, which by their nature require special housing. Other materials often separately shelved include subject collections relating to the library's special interests, donor and local history collections, or those assembled for particular groups of readers such as young adults. Locations of such collections are usually indicated by a distinguishing mark or label.

Whereas the duty of shelving is a simple one, the amount of work involved in this connection in large libraries is considerable.

### Reading shelves and files

This duty involves going over shelves, pamphlet and other files and checking item by item to be sure each is in its correct place. Documents, serials and vertical file materials require less frequent, but careful checking. Shelf reading is time consuming but essential to good book service, since without being kept in order a library is soon unusable.

### Keeping shelves and files orderly

This housekeeping task includes aligning books so that shelves are "dressed," providing supports to keep books upright, stacking and typing unbound magazines and documents, etc., to the end that stack areas are orderly in appearance.

### Clearing tables and keeping reading rooms in order

In the reading rooms of large public and university libraries this will be an almost continuous duty. In reference rooms in particular much time is lost in searching if books are not in their regular locations. Neatness and order help to maintain a desirable atmosphere for reading and study.

### Scheduling shelf reading

This duty provides for assignment of the task of "reading" shelves so that the order of the book collection is systematically checked at regular intervals. For the more frequently used sections additional care in scheduling is required.

### Supervising order and appearance of shelves

The size of the library and the degree to which readers have access to the books affects the amount of supervision required to keep the collection in order. Routine and spot inspections are the usual methods of supervising shelf work. During such inspections the supervisor makes note of minor shifting needed, checks condition of shelf labels and location guides and also withdraws such books as need relabeling or mending.

### Shifting books and other library materials

Shifting of library materials in class order from old to new locations and according to previously worked out plans requires careful scheduling of the operation to avoid disruption of the library's services. Preparatory to the actual moving the task involves measuring shelving available, estimating space needed for present and future use, adjusting height of shelves as required and providing corrected shelf labels and stack guides.

### Taking book inventory

This is the task of checking the shelf list, (a record of books in the library arranged in the same order in which they stand on the shelves) with the entire stock whatever its location at the time. The frequency with which this is done varies in different libraries, but because of the slowness with which it proceeds it is often a continuous process in large libraries. Besides revealing missing books, it offers opportunity to correct errors in the relabeling in book numbers, or in labeling of books.

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